DOCUMENT RESUME

ED 478 608 CE 085 192

AUTHOR	Ray, Gayl M.; Wilson, Nick; Mangini, Rick
TITLE	Ohio Business Management. Technical Competency Profile (TCP).
INSTITUTION	Ohio State Univ., Columbus. Center on Education and Training for Employment.; Ohio Board of Regents, Columbus.; Ohio State Dept. of Education, Columbus.
SPONS AGENCY	Ohio State Dept. of Education, Columbus. Div. of Career-Technical and Adult Education.
PUB DATE	2003-00-00
NOTE	138p.
CONTRACT	GRF-200-545
AVAILABLE FROM	For full text: http://www.ohtpcs.org/cp/busmgt.asp.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	EDRS Price MF01/PC06 Plus Postage.
DESCRIPTORS	Administrator Education; Articulation (Education); Associate Degrees; Benchmarking; Business Administration; *Business Education; Career Development; College Preparation; *Competency Based Education; Educational Certificates; Entrepreneurship; *Managerial Occupations; Office Occupations; Performance Factors; Postsecondary Education; Professional Development; Secondary Education; State Standards; *Tech Prep; *Vocational Education
IDENTIFIERS	Business Law; *Career and Technical Education; Knowledge Management; *Ohio

ABSTRACT

This document describes the essential competencies from secondary through post-secondary associate degree programs for a career in business management. Ohio College Tech Prep Program standards are described, and a key to profile codes is provided. Sample occupations in this career area, such as management trainee, product manager, and advertising executive, are listed. A table lists year 2003 business core competencies and business management competencies by instructional unit and educational level. Next are core business competencies and business management competencies, all of which appear by instructional unit. Each competency is accompanied by key indicators. The core instructional units are: career development for business, professional effectiveness, business economics, business communications, accounting, computation, business law, technology, international business, management, marketing, entrepreneurship. The business management units are: professional development and networking, professional effectiveness, general administrative functions, management, entrepreneurship, operations management, human resources management, quality assurance, process/project management, financial management, business law and legal issues, risk management, international business, intelligence management, data mining, and knowledge management. Four appendices contain a list of review panel members; a blank template that can be used to prepare a college preparation pathway, with spaces to list classes and prerequisites; professional associations, certifications and licensure in the field; and a map showing the Ohio Tech Prep Consortia. (SLR)

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ED 478 608

Ohio
Business Management

Technical Competency Profile
(TCP)

2003

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Ohio Business Management

Technical Competency Profile (TCP)

Gayl M. Ray
Project Manager
College Tech Prep Curriculum Services
Center on Education and Training for Employment
The Ohio State University

Nick Wilson
Assistant Director
K-16 Tech Prep Initiatives
Ohio Board of Regents

Rick Mangini
Assistant Director
Business, Marketing, and Information Technology Education
Office of Career-Technical and Adult Education
Ohio Department of Education

2003

This project is supported in whole by the Ohio General Revenue Fund (GRF) 200-545, Vocational Education Enhancements, distributed by the Ohio Department of Education, Office of Career-Technical and Adult Education

This project is a collaborative effort of the Ohio Department of Education, Ohio Board of Regents, and The Ohio State University, Center on Education and Training for Employment

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Acknowledgements

The **Business Management Technical Competency Profile (TCP)** project is a joint effort of the Ohio Board of Regents and the Ohio Department of Education. A number of individuals contributed their time and expertise to this initiative. In addition to the professionals listed in Appendix A, special thanks are due to:

- Vicki Melvin, Director, Career-Technical and Adult Education, Ohio Department of Education
- Jonathan L. Tafel, Vice Chancellor for Educational Linkages and Access, Ohio Board of Regents
- Linnae Clinton, Associate Director, Career-Technical and Adult Education, Ohio Department of Education
- Richard Arndt, Director, K-16 Initiatives, Ohio Board of Regents
- Kathy Sommers, College Tech Prep Coordinator, Career-Technical and Adult Education, Ohio Department of Education
- Nick Wilson, Assistant Director, K-16 Initiatives, Ohio Board of Regents
- Lavonna F. Miller, Former Project Director, College Tech Prep Curriculum Services, The Ohio State University
- Rick Mangini, Assistant Director; Business, Marketing, and Information Technology Education; Career-Technical and Adult Education, Ohio Department of Education

Thanks are also due to the following:

Project Manager:	Gayl M. Ray, Research Specialist College Tech Prep Curriculum Services The Ohio State University
Project Liaison:	Ruth Ann Falconer-Tallman, Business Education Consultant Career-Technical and Adult Education Ohio Department of Education
Project Director:	Dee Allenspach, Educational Consultant Center on Education and Training for Employment The Ohio State University
Project Consultant:	Joyce Leimbach, Educational Consultant Center on Education and Training for Employment The Ohio State University
Information Services:	Damian Brown, Systems Specialist College Tech Prep Curriculum Services The Ohio State University
Administrative Support:	Janet I. Ray, Office Production Associate College Tech Prep Curriculum Services The Ohio State University

Introduction

Technical Competency Profiles (TCP) are collaboratively developed by the Ohio Board of Regents and the Ohio Department of Education, Career-Technical and Adult Education, and the Center on Education and Training for Employment at The Ohio State University. The profile provides a framework for a broad-based secondary and post-secondary curriculum.

The profile includes essential competencies for programs from secondary through post-secondary associate degree programs. Each area contains competencies common to each of the occupations within a career cluster and competencies specific to an occupation. This profile design reflects programming flexibility that represents many options for educational studies and career planning.

Representatives from a broad spectrum of Ohio professionals played a critical role in defining the vision and scope of the TCP and in defining the essential and recommended skills for current and future employees. Secondary and post-secondary educators representing Ohio schools and colleges leveled the competencies to create career pathways from secondary to associate degree programs. A list of business and industry representatives and educators participating in the development of the profile appears in Appendix A.

Technical Competency Profiles (TCP) are used as the basis for the development of an integrated delivery system that provides opportunities for new and challenging programs and courses. Career-Technical Education, College Tech Prep, and post-secondary degree programs will be enhanced and expanded through the use of the Technical Competency Profile (TCP).

The profiles are available on the Internet at www.ohtpcs.org. At this location users can download copies of the entire profile or conduct searches on a number of key variables.

For additional information contact:

College Tech Prep Curriculum Services
Center on Education & Training for Employment
The Ohio State University
1900 Kenny Road
Columbus, OH 43210
614/688-8501

Business, Marketing, & Information
Technology Education
Ohio Department of Education
25 South Front Street, Sixth Floor
Columbus, OH 43215
614/466-3891

College Tech Prep Program Standards

College Tech Prep programs are rigorous programs of study starting at the secondary school level and continuing through the associate degree and beyond. In accordance with the Carl D. Perkins Vocational Technical Education Enhancement Act of 1998, College Tech Prep programs are seamless, non-duplicative programs of study combining high-level academic and technical preparation in a variety of career fields.

The Carl D. Perkins Vocational and Technical Education Act of 1998 defines College Tech Prep as:

> *A program that provides technical preparation in a career field such as engineering, applied science, a mechanical, industrial or practical arts or trade, agriculture, health occupations, business or applied economics and must do the following:*
> - *Combines at least two years of secondary and two years of post-secondary education in a sequential course of study without duplication of coursework*
> - *Integrates academic, vocational and technical education, and if appropriate and available, work-based learning*
> - *Provides technical preparation for careers*
> - *Leads to an associate or a baccalaureate degree or post-secondary certificate in a specific career field*
> - *Leads to placement in appropriate employment or further education.*

The Ohio College Tech Prep Advisory Council recommended to the Ohio Board of Regents and the Ohio Department of Education the following standards for all College Tech Prep programs:

1. Academics are taught at a college-preparatory level and are aligned with state models and academic content standards.
2. In addition to Ohio graduation requirements specified in SB 55, required academic components for College Tech Prep programs include:
    a. Mathematics taught at a minimum level of Algebra II by the completion of high school.
    b. An integrated or stand alone senior-year math component
    c. Three units of science including at least two lab-based science courses
3. College Tech Prep programs will use a state-developed Technical Competency Profile (TCP) as the basis for pathway development. The pathway document should reflect secondary and post-secondary course work and should be made available for stakeholders. All secondary and post-secondary TCP competencies must be clearly identified and addressed. The TCP is the framework used to develop all associated curricular documents; however, components from other competency profiles such as OCAP's (*Occupational Competency Analysis Profile*), ITAC's *(Integrated Technical and Academic Competencies)* and SCANS (*The Secretary's Commission on Achieving Necessary Skills—America 2000*) may be included and are not mutually excluded from a TCP.
4. Articulated pathways will be reviewed every two-years at the consortia level.
5. Pathways operate under an articulation agreement between/among partners in a consortium.
6. College Tech Prep programs at the secondary level will operate as state-approved, career-technical education programs.
7. Academic and technical instruction is integrated and delivered in a contextual approach where possible.
8. Programs have common representation from secondary education, higher education, business, and labor members.
9. Post-secondary programs contain advanced skills in the TCP document.
10. Programs must operate under either regionally accredited post-secondary institutions/degrees or approved apprenticeship programs meeting U.S. Department of Labor standards.
11. College Tech Prep programs, secondary and post-secondary, must comply with the state College Tech Prep Advisory Council's performance measures.

State College Tech Prep Advisory Council
Revised and Approved: May 1, 2002

College Tech Prep

College Tech Prep is a high school and college career path linked to business, industry, and labor that insures a specified seamless pathway from high school to college to careers, meeting Ohio's technological employment needs.

A College Tech Prep student is enrolled in a state-approved College Tech Prep education program. A College Tech Prep Program means a program of study that:

- Combines, at a minimum, two years of secondary education (as determined by Ohio definitions) with a minimum of two years of post-secondary education in a non-duplicative, sequential course of study.
- Integrates academic and technical instruction and utilizes work-based and work-site learning, where appropriate and available.
- Provides technical preparation in a career field such as engineering technology; applied science; mechanical; industrial or practical arts or trades; agriculture; health occupations; business; or applied economics.
- Builds student competencies in mathematics, science, reading, writing, communications, economics, and workplace skills through applied, contextual academics, and integrated instruction, in a coherent sequence of courses.
- Leads to an associate or baccalaureate degree, or a BAT (Bureau of Apprenticeship Training) apprenticeship requiring a minimum of two years in a specific career field.
- Leads to placement in related employment, or to further education.

Key to Profile Codes

Importance of Competencies

All of the competencies in this document represent the minimum requirements for a College Tech Prep program. It is the responsibility of the local consortia to further define and/or expand, as needed, the key indicators for each competency. Each competency must be taught at the Proficient level (P) by the completion of the College Tech Prep program, which is an Associate Degree (AD). A minimal number of competencies have been identified as Introduce (I) at the Associate Degree level. These may require further higher education.

This document integrates college prep level academics with technical skill. Technical skills are a required component.

I = **Introduce** (Learner will demonstrate knowledge and comprehension of the competency.)

P = **Proficient** (Learner will demonstrate ability to apply knowledge of and/or perform the competency.)

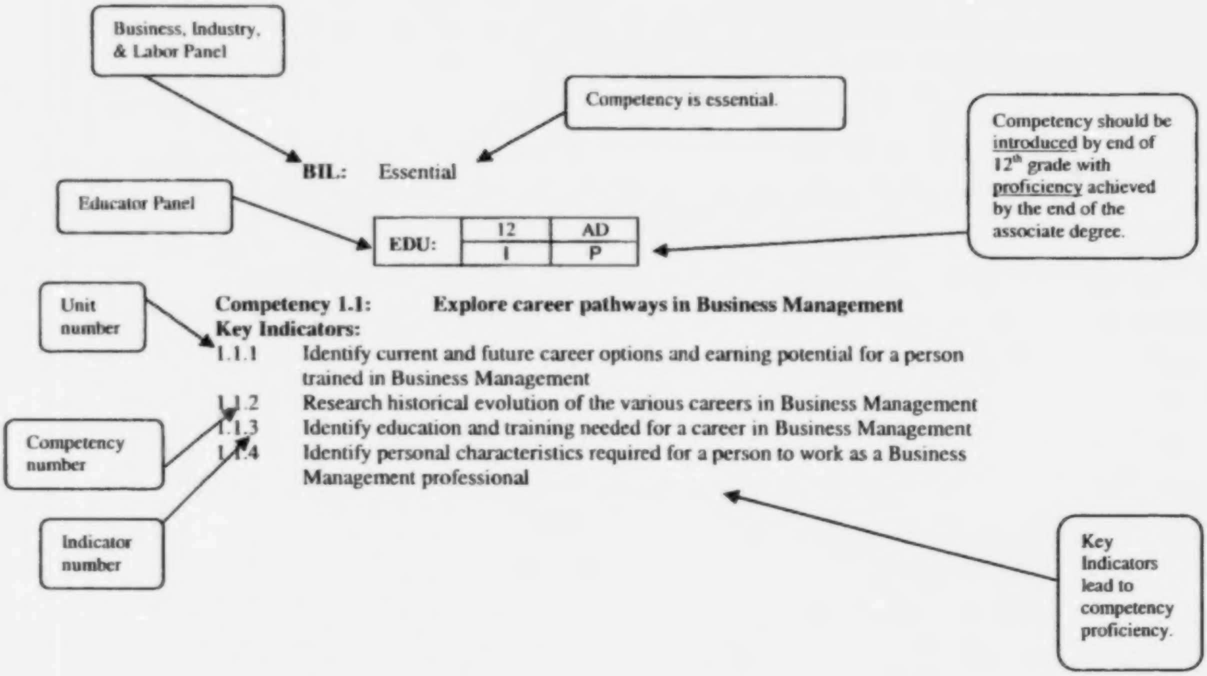
R = **Reinforced** (Competencies marked proficient at the secondary level are to be reinforced at the associate degree level.)

Grade Level: **12** = by the end of grade 12
AD = by the end of the Associate Degree

ACADEMIC CONNECTION

All College Tech Prep programs are responsible for meeting the academic content standards.

EXAMPLE:


Business, Industry, & Labor Panel
Competency is essential.
Competency should be introduced by end of 12th grade with proficiency achieved by the end of the associate degree.
Educator Panel
Unit number
Competency number
Indicator number
Key Indicators lead to competency proficiency.

BIL: Essential

EDU:	12	AD
	I	P

Competency 1.1: Explore career pathways in Business Management

Key Indicators:

1.1.1 Identify current and future career options and earning potential for a person trained in Business Management
1.1.2 Research historical evolution of the various careers in Business Management
1.1.3 Identify education and training needed for a career in Business Management
1.1.4 Identify personal characteristics required for a person to work as a Business Management professional

Business Management

Management is a skill. Research and experience show that the way the manager behaves has a powerful effect on motivation, business success, and ultimately profit. Management involves the coordination, implementation, promotion, supervision, and directing of the activities of individuals, organizations, and businesses. Business management students will study methods of operation, coordination, sales, marketing, finance, budgeting, human resources, property/equipment management, and safety/security management. They will acquire skills in organization, leadership, planning, interpersonal communications, delegating, supervising, resource management, and policymaking/implementation. Effective management is the foundation of a successful business or organization.

Sample Occupations

Management Trainee
Non-profit Manager
For-profit Manager
Project Manager
Quality Process Manager
Management Consultant
Administrative Service Manager
Product Manager
Production Manager
Knowledge Manager
Research and Development Manager
Operations Manager
Human Resources Manager/Director
Employment and Placement Manager
Talent Manager (Recruiter)
EEO Officer
Compensation Manager
Occupational Analyst
Advertising Executive
Director of Career Services
Sales Manager
Purchasing Agent
Convention Planner
Personnel Administrator
Safety Manager
Office Manager

2003 BUSINESS MANAGEMENT COMPETENCY CHART

NOTE: Instruction in the Business Management competency profile should be preceded by instruction in the Business Core Competencies. Each competency is coded: I = Introductory; P = Proficient; R = Reinforce.

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
1	**Career Development in Business**			
	1.1 Demonstrate knowledge of the history of business operations	P		
	1.2 Identify desirable personality traits important to businesses	P		
	1.3 Assess personal interests and skills needed for success in business	P		
	1.4 Set personal goals	P		
	1.5 Explain the need for employee development	P		
	1.6 Explain potential career advancement patterns for jobs	P		
	1.7 Describe skills and factors that enhance career progression	P		
	1.8 Use networking techniques for professional growth	P		
	1.9 Use resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, mentors)	P		
	1.10 Manage professional development	P		
2	**Professional Effectiveness**			
	2.1 Explain professional responsibilities	P		
	2.2 Describe work ethic standards	P		
	2.3 Identify legal and ethical behavior	P		
	2.4 Apply appropriate work ethic	P		
	2.5 Demonstrate ethical work habits	P		
	2.6 Recognize personal biases and stereotypes	P		
	2.7 Apply time-management principles	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	2.8 Explain the rights of workers	P		
	2.9 Function as a self-managed employee	P		
	2.10 Follow intellectual property rights and copyright laws	P		
	2.11 Apply decision-making techniques	P		
	2.12 Apply problem-solving techniques	P		
	2.13 Explain the nature of stress management	P		
	2.14 Manage stressful situations	P		
	2.15 Achieve organizational goals	P		
	2.16 Maintain a safe working environment	P		
	2.17 Maintain company security	P		
	2.18 Participate in the organization's community outreach involvement	P		
3	**Business Economics**			
	3.1 Compare basic types of economic systems	P		
	3.2 Compare basic features of different economic systems	P		
	3.3 Distinguish between economic goods and services	P		
	3.4 Explain importance of resources to the economy	P		
	3.5 Describe the nature of economics and economic activities	P		
	3.6 Explain the principles of supply and demand	P		
	3.7 Describe the concept of price	P		
	3.8 Examine characteristics of business	P		
	3.9 Demonstrate knowledge of business operation	P		
	3.10 Explain concept of organized labor and business	P		
	3.11 Apply business economic concepts	P		
	3.12 Examine issues related to managing economic resources	P		
	3.13 Analyze economic indicators and trends	P		
	3.14 Explain measures used to analyze economic conditions	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	3.15 Explain the role of the Consumer Price Index (CPI) in business	P		
	3.16 Explain the concept of Gross Domestic Product (GDP)	P		
	3.17 Describe the nature of current economic problems	P		
	3.18 Explain the nature of international trade	P		
	3.19 Identify the impact of cultural and social environments on world trade	P		
	3.20 Evaluate influences on a nation's ability to trade	P		
4	**Business Communications**			
	4.1 Explain nature of effective communication	P		
	4.2 Apply effective listening skills	P		
	4.3 Use proper grammar and vocabulary	P		
	4.4 Explain the nature of effective verbal communication	P		
	4.5 Address people properly	P		
	4.6 Handle telephone calls in a businesslike manner	P		
	4.7 Make oral presentations	P		
	4.8 Utilize written communication	P		
	4.9 Use communication technologies/systems (e.g., e-mail, facsimile transaction [FAX], voice mail, cell phones, conference calling, answering systems, teleconferencing)	P		
	4.10 Communicate using telecommunications tools	P		
	4.11 Communicate effectively following company guidelines in the business environment	P		
	4.12 Demonstrate ethical behavior in workplace communication	P		
	4.13 Foster positive working relationships	P		
	4.14 Demonstrate teamwork	P		
	4.15 Explain nature of positive customer/client relations	P		
	4.16 Explain the nature of organizational change	P		
	4.17 Describe the nature of organizational conflict	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	4.18 Build customer and coworker relations	P		
	4.19 Build customer service	P		
	4.20 Deliver business presentations	P		
	4.21 Prepare written business documents	P		
5	**Accounting**			
	5.1 Complete the accounting cycle	P		
	5.2 Apply generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity	P		
	5.3 Maintain cash control	P		
6	**Computation**			
	6.1 Apply mathematics skills in business operations	P		
	6.2 Determine mathematical procedures to solve business problems	P		
	6.3 Use mathematical procedures to calculate wages and benefits	P		
	6.4 Interpret data using common statistical procedures	P		
	6.5 Use mathematical procedures to solve business problems	P		
7	**Business Law**			
	7.1 Examine foundation of business law	P		
	7.2 Explore the American legal system	P		
	7.3 Describe the difference between ethics and the law	P		
	7.4 Discuss the relationships between contract law, law of sales, and consumer law	P		
	7.5 Describe legal aspects of business formation	P		
	7.6 Describe functions of commercial paper, insurance, secured transactions, and business bankruptcy	P		
8	**Technology**			
	8.1 Utilize computer hardware	P		
	8.2 Discuss various types of computer software	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	8.3 Use computer operating systems	P		
	8.4 Use applications	P		
	8.5 Utilize on-line functions	P		
	8.6 Utilize electronic mail	P		
	8.7 Utilize the Internet	P		
	8.8 Assess impact of technology on the workplace	P		
	8.9 Use references and data from technological sources (e.g., gather, evaluate, use, cite)	P		
	8.10 Adhere to laws governing technology	P		
	8.11 Develop skills and knowledge needed to obtain technical support services	P		
	8.12 Abide by risk-management policies and procedures for technology	P		
	8.13 Follow policies for managing privacy and ethical issues in organizations	P		
	8.14 Apply technology to business applications	P		
	8.15 Use Internet as a business tool	P		
9	**International Business**			
	9.1 Explain impact of international business	P		
	9.2 Apply communication strategies necessary for effective and profitable international business relations	P		
10	**Management**			
	10.1 Identify business management practices	P		
	10.2 Discuss management functions and their integration within the business functions	P		
	10.3 Explain management theories and their application with the business environment	P		
	10.4 Describe human resource functions and their importance to an organization's successful operation	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
11	**Marketing**			
	11.1 Explain impact of marketing activities on the individual, business, and society	P		
	11.2 Describe characteristics, motivations, and behaviors of consumers	P		
	11.3 Describe influence of external factors on marketing	P		
	11.4 Discuss elements of the marketing mix and how they are used in the marketing process	P		
	11.5 Describe elements, design, and purposes of the marketing plan	P		
	11.6 Evaluate marketing concepts	P		
	11.7 Examine the role of the selling process	P		
12	**Entrepreneurship**			
	12.1 Identify factors to be considered by a potential entrepreneur	P		
	12.2 Apply economic concepts when making decisions for an entrepreneurial venture	P		
	12.3 Discuss how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures	P		
	12.4 Analyze financial data	P		
	12.5 Analyze credit issues	P		
	12.6 Develop a financial plan	P		
	12.7 Perform banking functions	P		
	12.8 Apply analytical skills in business operations	P		
	12.9 Identify key elements of business organizations	P		
	12.10 Identify business management practices	P		
	12.11 Perform scheduling functions	P		
	12.12 Conduct meetings and other group functions	P		
	12.13 Maintain a records management system	P		
	12.14 Manage inventory	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	12.15 Examine personnel management concepts	P		
	12.16 Perform shipping and mailing functions	P		

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
1	**Professional Development and Networking**			
	1.1 Explore career pathways in business management		P	R
	1.2 Explore professional development opportunities for a business management professional		I	P
	1.3 Utilize professional resource materials		I	P
2	**Professional Effectiveness**			
	2.1 Function as a self-managed employee		P	R
	2.2 Follow intellectual property rights and copyright laws		P	
	2.3 Achieve organizational goals		P	
	2.4 Maintain a safe working environment		P	
	2.5 Maintain company security		I	P
3	**General Administrative Functions**			
	3.1 Maintain work flow		P	
	3.2 Perform telecommunications operations		P	
	3.3 Perform scheduling functions		P	
	3.4 Manage records		P	
4	**Management**			
	4.1 Describe business management		P	
	4.2 Demonstrate management skills and responsibilities		P	
	4.3 Develop strategies to achieve company goals/objectives		I	P
	4.4 Develop a personnel organizational plan		P	
	4.5 Develop a management plan for a business		I	P
	4.6 Apply internal environmental scanning techniques			I
	4.7 Apply external environmental scanning techniques			I

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
	4.8 Evaluate applicability of internal and external scanning techniques to goals and objectives			I
	4.9 Monitor business profitability		I	P
	4.10 Describe crucial components of a quality culture		P	
	4.11 Describe the role of management in quality achievement		P	
	4.12 Explain the nature of managerial ethics		P	
5	**Entrepreneurship**			
	5.1 Explore entrepreneurship		P	
	5.2 Demonstrate an understanding of economic principles		P	
	5.3 Develop financial competence needed by an entrepreneur		I	P
	5.4 Determine the options for the organization of a business and its operations		I	P
	5.5 Develop a business plan		I	P
	5.6 Formulate a marketing strategy for a business		I	P
	5.7 Analyze financial issues		I	P
	5.8 Address changing business environment		I	P
	5.9 Illustrate components of productivity		P	
6	**Operations Management**			
	6.1 Manage purchasing and supply chain		I	P
	6.2 Explain the nature and scope of purchasing		I	P
	6.3 Explain company purchasing policies		I	P
	6.4 Explain the nature of the buying process		I	P
	6.5 Explain the nature of vendor relationships		P	
	6.6 Conduct vendor search		I	P
	6.7 Negotiate contracts with vendors			P
	6.8 Explain the concept of production		P	
	6.9 Plan production			P
	6.10 Establish best practice benchmark measures for operations			P

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
	6.11 Integrate product development into the operational process			P
	6.12 Implement new technology for profitability			P
	6.13 Disseminate information			P
	6.14 Apply operations management principles and procedures			P
	6.15 Analyze job costing			P
7	**Human Resource Management**			
	7.1 Apply basic human resource management concepts		I	P
	7.2 Perform workforce staffing functions		I	P
	7.3 Serve as a resource for employees		I	P
	7.4 Manage employees		P	R
	7.5 Administer compensation and benefits program		I	P
	7.6 Administer employee development program		I	P
	7.7 Administer programs that encourage employee safety and wellness		I	P
	7.8 Use appropriate release techniques for organizational exit		P	R
8	**Quality Assurance**			
	8.1 Explain quality assurance			P
	8.2 Employ quality tools			P
	8.3 Examine quality cost implications			P
	8.4 Produce a quality product that is consistent with a company's goals and objectives			P
	8.5 Develop interdepartmental relationships to support quality assurance that is consistent with a company's goals & objectives			P
9	**Process and Project Management**			
	9.1 Initiate a project		I	P
	9.2 Plan a project		I	P
	9.3 Execute project		I	P

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
	9.4 Control project		I	P
	9.5 Exhibit professional behavior as a project manager		I	P
	9.6 Coordinate a project, using quality tools, to achieve required balance of time, cost, and quality (e.g., project planning, execution, change control)		I	P
	9.7 Manage a project		I	P
	9.8 Manage costs		I	P
	9.9 Manage quality		I	P
	9.10 Distribute quality project information		I	P
	9.11 Control risk		I	P
	9.12 Perform project procurement management to ensure quality service or product acquisition		I	P
	9.13 Close project		I	P
10	**Financial Management**			
	10.1 Apply accounting principles		P	R
	10.2 Describe the impact of finances on various departments		I	P
11	**Business Law and Legal Issues**			
	11.1 Describe legal issues affecting businesses		P	R
	11.2 Explain the nature of personnel regulations		P	R
	11.3 Discuss labor laws		P	R
	11.4 Explain/monitor the nature of workplace regulations (e.g., OSHA, ADA)		P	R
	11.5 Explain/monitor environmental regulations		P	R
	11.6 Explain/monitor tax regulations affecting businesses		P	R
	11.7 Explain/monitor businesses' reporting requirements		P	R
	11.8 Describe legally binding contracts		P	R
	11.9 Explain intellectual property rights covered by intellectual law		P	R
	11.10 Explain the nature of trade regulations		P	R

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
	11.11 Explain commercial real estate law		P	R
	11.12 Evaluate the use of legal action		I	P
12	**Risk Management**			
	12.1 Explain types of business risk		P	
	12.2 Identify speculative business risks		P	
	12.3 Demonstrate knowledge of risk management		I	P
	12.4 Manage risk		P	R
	12.5 Perform credit risk management		I	P
	12.6 Follow operational and integrated risk management procedures		I	P
	12.7 Describe legal, accounting, and task risk management		P	R
	12.8 Explain regulation and compliance		P	R
13	**International Business**			
	13.1 Identify forms of business ownership and entrepreneurial opportunities available in international business		P	
	13.2 Manage involvement in international business		I	P
	13.3 Identify international business success		P	
	13.4 Relate balance of trade concepts to the import/export process		I	P
	13.5 Analyze special challenges in operations and human resource management in international business			P
14	**Intelligence Management**			
	14.1 Use effective communication skills for intelligence management		P	
	14.2 Utilize intelligence management		I	P
	14.3 Apply intelligence management skills within an organization			P
	14.4 Develop interpersonal skills needed in intelligence management		I	P

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
15	**Data Mining**			
	15.1 Explain data mining		P	
	15.2 Apply ethical behaviors to data mining		P	
	15.3 Use basic data mining techniques in making management decisions		I	P
16	**Knowledge-Management**			
	16.1 Explore knowledge-management		I	P
	16.2 Analyze elements in knowledge-management framework			I
	16.3 Analyze functions and roles of chief knowledge officer			I
	16.4 Evaluate knowledge-management implementation programs			I
	16.5 Develop knowledge-management strategies			I
	16.6 Develop knowledge-management prototype			I
	16.7 Build knowledge-management infrastructure			I
	16.8 Evaluate communities of practice as organizational structure			I
	16.9 Evaluate people-to-people approaches used in knowledge-management			I
	16.10 Analyze importance of capture and transfer of strategic knowledge			I
	16.11 Implement knowledge-management using technology			I
	16.12 Choose electronic tools to support collaboration			I
	16.13 Manage content			I
	16.14 Analyze organizational culture and the role of knowledge-management			I
	16.15 Determine barriers that affect knowledge-management implementation			I
	16.16 Design knowledge-management communication plan			I
	16.17 Design knowledge-management measurement system			I

INSTRUCTIONAL UNIT	BUSINESS MANAGEMENT COMPETENCY	BUSINESS CORE	PROFICIENT HS	PROFICIENT AD
	16.18 Evaluate various knowledge-management measurement approaches			I
	16.19 Measure intellectual capital			I
	16.20 Design knowledge-management implementation plan			I
	16.21 Practice ethical behavior for knowledge-management			I
	16.22 Calculate Return on Investment (ROI) for knowledge-management programs/projects			I
	16.23 Design physical space for effective knowledge-management			I
	16.24 Explain the relationship of social network engineering and knowledge-management			I

Business Management TCP

Core Instructional Units

1. Career Development for Business
2. Professional Effectiveness
3. Business Economics
4. Business Communications
5. Accounting
6. Computation
7. Business Law
8. Technology
9. International Business
10. Management
11. Marketing
12. Entrepreneurship

Business Management Instructional Units

1. Professional Development and Networking
2. Professional Effectiveness
3. General Administrative Functions
4. Management
5. Entrepreneurship
6. Operations Management
7. Human Resources Management
8. Quality Assurance
9. Process/Project Management
10. Financial Management
11. Business Law & Legal Issues
12. Risk Management
13. International Business
14. Intelligence Management
15. Data Mining
16. Knowledge Management

Core for Business TCP

Instructional Unit 1: Career Development in Business

Competency 1.1: Demonstrate knowledge of the history of business operations
Key Indicators:

1.1.1 Describe history of business
1.1.2 Compare/contrast current business practices with those of the twentieth century
1.1.3 Explore careers within the field of business and management

Competency 1.2: Identify desirable personality traits important to businesses
Key Indicators:

1.2.1 Describe personality trait terms (e.g., trait, physical traits, mental traits, emotional traits, dependability, industriousness, honesty and integrity, loyalty, positive attitude, interest and enthusiasm, adaptability, initiative, creativity, self-control, self-confidence, empathy, assertiveness, leadership, cooperativeness, orderliness)
1.2.2 Identify categories of personal traits
1.2.3 Describe interdependence of personal traits
1.2.4 Describe types of desirable personal traits in business
1.2.5 Describe steps that can be taken to change undesirable personal traits
1.2.6 Maintain appropriate personal appearance
1.2.7 Maintain positive attitude
1.2.8 Show empathy for others
1.2.9 Demonstrate interest and enthusiasm, responsible behavior, honesty and integrity, initiative, and self-control

Competency 1.3: Assess personal interests and skills needed for success in business
Key Indicators:

1.3.1 Describe personal characteristics (e.g., realistic, investigative, artistic, social, enterprising, creative)
1.3.2 Assess strengths and weaknesses
1.3.3 Explain reasons for assessing personal interests and skills
1.3.4 Discuss the importance of objectivity in personal assessment

Competency 1.4: Set personal goals
Key Indicators:

1.4.1 Describe goal-setting terms (e.g., goals and short- and long-term goals)
1.4.2 Describe benefits of setting goals
1.4.3 Demonstrate steps for setting goals

Competency 1.5: Explain the need for employee development

Key Indicators:

1.5.1 Explain benefits associated with the continuing education for employees
1.5.2 Identify types of training provided by companies for their employees
1.5.3 Identify external sources of employee training
1.5.4 Explain types of external training available to employees
1.5.5 Describe occasions when employees need training

Competency 1.6: Explain potential career advancement patterns for jobs

Key Indicators:

1.6.1 Describe occupational terms (e.g., job, career, occupation, job promotion, seniority)
1.6.2 Explain value of entry-level job positions
1.6.3 Identify reasons promotion opportunities arise
1.6.4 Explain why change may be necessary for workers to advance
1.6.5 Compare/contrast promotion opportunities among occupations and various business career pathways

Competency 1.7: Describe skills and factors that enhance career progression

Key Indicators:

1.7.1 Describe factors employers consider when making promotion decisions (e.g., skills, personal characteristics, education, seniority, job performance)
1.7.2 Explain techniques employees can use to enhance career progression
1.7.3 Explain ways of maintaining positive working relationships with other workers

Competency 1.8: Use networking techniques for professional growth

Key Indicators:

1.8.1 Describe benefits of networking
1.8.2 Discuss occasions and techniques for networking
1.8.3 Demonstrate procedures for using networking techniques for professional growth

Competency 1.9: Use resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, mentors)

Key Indicators:

1.9.1 Describe benefits obtained from reading professional trade journals/periodicals
1.9.2 Describe benefits of membership in a professional organization
1.9.3 Explain ways that classes/seminars can contribute to professional development
1.9.4 Identify types and benefits of various trade shows

Competency 1.10: Manage professional development

Key Indicators:

1.10.1 Practice lifelong learning
1.10.2 Participate in professional organizations/associations
1.10.3 Read professional publications
1.10.4 Build internal/external mentor relationships
1.10.5 Build internal/external professional system
1.10.6 Build professional network
1.10.7 Strengthen management, communication, and leadership skills
1.10.8 Determine the benefits to business of employees' belonging to professional organizations (e.g., membership, networking)

Instructional Unit 2: Professional Effectiveness

Competency 2.1: Explain professional responsibilities
Key Indicators:
2.1.1 Explain need for professional and ethical standards
2.1.2 Explain responsibility of the individual to apply ethical standards
2.1.3 Identify responsibility to clients and employers
2.1.4 Explain consequences of unprofessional and/or unethical behavior
2.1.5 Explain importance of conflict resolution in the work environment

Competency 2.2: Describe work ethic standards
Key Indicators:
2.2.1 Define work ethic
2.2.2 Identify factors that influence one's work ethic
2.2.3 Differentiate between law and ethics
2.2.4 Describe how personal values are reflected in work ethic
2.2.5 Describe how interactions in the workplace affect personal work ethic
2.2.6 Describe how life changes affect personal work ethic

Competency 2.3: Identify legal and ethical behavior
Key Indicators:
2.3.1 Differentiate between legal and ethical behavior
2.3.2 Explain terms, principles, and characteristics of legal and ethical behavior (e.g., loyalty, discretion, competitor, supplier)
2.3.3 Explain legal ramifications of breaching rules and regulations
2.3.4 Explain effects of unethical and/or unlawful behavior

Competency 2.4: Apply appropriate work ethic
Key Indicators:
2.4.1 Adhere to company and/or governmental policies, procedures, rules, and regulations
2.4.2 Exercise confidentiality
2.4.3 Adhere to rules of conduct
2.4.4 Accept constructive criticism
2.4.5 Offer constructive criticism
2.4.6 Exhibit pride in work
2.4.7 Resolve conflict
2.4.8 Mentor fellow workers
2.4.9 Avoid sexual connotations and harassment
2.4.10 Adjust to changes in the work environment
2.4.11 Exhibit punctuality
2.4.12 Assume responsibility for decisions and actions
2.4.13 Take responsibility for assignments
2.4.14 Follow chain-of-command

Competency 2.5: Demonstrate ethical work habits
Key Indicators:
2.5.1 Describe ethic terms (e.g., ethics, personal code of ethics)
2.5.2 Identify examples of unethical behavior at work
2.5.3 Describe ways to demonstrate a basic work ethic

Competency 2.6: Recognize personal biases and stereotypes
Key Indicators:
2.6.1 Describe personality terms (e.g., discrimination, prejudice, bias, stereotype)
2.6.2 Recognize factors that are important to consider when evaluating others in the workplace
2.6.3 Identify situations in which discrimination exists
2.6.4 Describe consequences of discrimination
2.6.5 Explain how federal laws protect against discrimination
2.6.6 Describe steps for identifying personal biases and stereotypes
2.6.7 Explain why diversity is an asset to an organization

Competency 2.7: Apply time-management principles
Key Indicators:
2.7.1 Describe time-management terms (e.g., time management, stress, procrastination, free time, weekly master list, technology, prioritize, delegate, to-do list)
2.7.2 Explain time-management process
2.7.3 List benefits of time management
2.7.4 Utilize current technology as a tool for time management

Competency 2.8: Explain the rights of workers
Key Indicators:
2.8.1 Describe employee's right to safe working environment (e.g., safe ergonomic practices, clean air)
2.8.2 Discuss employee's right to form unions
2.8.3 Explain employee's right to equitable treatment

Competency 2.9: Function as a self-managed employee
Key Indicators:
2.9.1 Propose projects
2.9.2 Organize tasks
2.9.3 Manage time
2.9.4 Meet deadlines
2.9.5 Maintain business records
2.9.6 Make long-term and short-term plans
2.9.7 Evaluate progress
2.9.8 Report progress

2.9.9 Delegate projects
2.9.10 Acquire appropriate licenses/registrations/credentials

Competency 2.10: Follow intellectual property rights and copyright laws
Key Indicators:
2.10.1 Explain purpose of patent
2.10.2 Explain purpose of copyright
2.10.3 Explain purpose of licenses
2.10.4 Explain purposes of trademarks
2.10.5 Explain rights of the originator
2.10.6 Explain rights of the public
2.10.7 Define confidentiality
2.10.8 Define proprietary
2.10.9 Explain legal ownership of proprietary material
2.10.10 Describe stock image/text usage rights
2.10.11 Explain negotiation of contracts
2.10.12 Explain reproduction licensing and residual usage
2.10.13 Apply concepts of intellectual property rights and copyright laws

Competency 2.11: Apply decision-making techniques
Key Indicators:
2.11.1 Identify decision to be made
2.11.1 Identify appropriate alternatives and consequences
2.11.2 Make decisions based on facts, legality, ethics, goals, and culture
2.11.3 Apply time factors
2.11.4 Present decision to be implemented
2.11.5 Evaluate decision
2.11.6 Accept responsibility for decision
2.11.7 Identify ownership of decision made

Competency 2.12: Apply problem-solving techniques
Key Indicators:
2.12.1 Identify problem
2.12.2 Select appropriate problem solving tools/techniques
2.12.3 Identify underlying causes of problem
2.12.4 Identify appropriate solutions and consequences (e.g., long-term, short-term, crisis)
2.12.5 Use resources to explore possible solutions to problem
2.12.6 Contrast advantages and disadvantages of each solution
2.12.7 Identify appropriate action
2.12.8 Evaluate results
2.12.9 Identify post-preventive action

Competency 2.13: Explain the nature of stress management

Key Indicators:

2.13.1 Describe signs of employee stress
2.13.2 Discuss causes of employee stress
2.13.3 Explain consequences of stress
2.13.4 Explain wellness programs that can identify, alleviate, and prevent employee stress

Competency 2.14: Manage stressful situations

Key Indicators:

2.14.1 Accept stress as integral part of life
2.14.2 Identify factors contributing to stress
2.14.3 Describe physical and emotional responses to stress
2.14.4 Evaluate positive and negative effects of stress on productivity
2.14.5 Identify strategies and/or methods to reduce/channel stress
2.14.6 Implement strategies to manage stress
2.14.7 Create strategies for developing and maintaining support systems

Competency 2.15: Achieve organizational goals

Key Indicators:

2.15.1 Evaluate personal goals in relation to organizational goals
2.15.2 Monitor progress by evaluating feedback
2.15.3 List responsibilities in relation to organizational goals
2.15.4 Accomplish assigned tasks
2.15.5 Exercise responsibility in relation to organizational goals
2.15.6 Set appropriate performance standards
2.15.7 Communicate goals with supervisor/peers
2.15.8 Exhibit knowledge of organization's products and services
2.15.9 Promote organizational image and mission

Competency 2.16: Maintain a safe working environment

Key Indicators:

2.16.1 Discuss the relationship between safety, productivity, and health
2.16.2 Identify health and safety standards established by government agencies
2.16.3 Ensure compliance with government and/or company rules and regulations related to health and safety
2.16.4 Access needed safety information using company and manufacturer's references
2.16.5 Establish preventive measures for dealing with the main causes of accidents in the work environment
2.16.6 Establish preventive measures for dealing with the main causes of health problems in the work environment
2.16.7 Establish preventive measures for dealing with violations of personnel security
2.16.8 Ensure maintenance of a clean work area

2.16.9 Perform safety inspections and audits
2.16.10 Solve safety problems using problem-solving, decision-making, and critical-thinking strategies

Competency 2.17: Maintain company security
Key Indicators:
2.17.1 Access needed information using company references
2.17.2 Plan security procedures in accordance with business ethics
2.17.3 Document security procedures
2.17.4 Communicate security procedures internally
2.17.5 Ensure compliance with security procedures
2.17.6 Perform security checks
2.17.7 Correct security problems

Competency 2.18: Participate in the organization's community outreach involvement
Key Indicators:
2.18.1 Propose educational, environmental, and community needs and social issues for which to focus organizational involvement
2.18.2 Select issues on which to focus organizational support
2.18.3 Participate in social and/or outreach activities
2.18.4 Encourage staff involvement
2.18.5 Recognize the importance of the organization's social and community relationships and their effects on the organization

Instructional Unit 3: Business Economics

Competency 3.1: Compare basic types of economic systems
Key Indicators:

3.1.1 Describe economic terms (e.g., economic system, traditional economic system command economic system, communism, socialism, market economic system)
3.1.2 Explain why economic systems are needed
3.1.3 Describe characteristics of economic systems
3.1.4 Describe characteristics of a market economic system
3.1.5 Describe strengths and weaknesses of various economies
3.1.6 Describe strengths and weaknesses of market economies

Competency 3.2: Compare basic features of different economic systems
Key Indicators:

3.2.1 Explore existing economies by comparing command, mixed, and market economies based on the criteria of freedom, efficiency, equity, security, employment, stability, and growth
3.2.2 Explain how change in one component of the circular flow of economic activity affects other components
3.2.3 Explain how economic systems, resources, and culture affect each other
3.2.4 Discuss how wages and prices are determined in command and market economies
3.2.5 Compare command, mixed, and market economies based on the criteria of freedom, efficiency, equity, security, employment, stability, and growth

Competency 3.3: Distinguish between economic goods and services
Key Indicators:

3.3.1 Describe economic terms (e.g., want, economic want, non-economic want, goods, services, consumer goods, industrial goods)
3.3.2 Distinguish between economic and non-economic wants
3.3.3 Distinguish between consumer and industrial goods and services
3.3.4 Explain how consumers affect the decision of what goods and services will be produced

Competency 3.4: Explain importance of resources to the economy
Key Indicators:

3.4.1 Describe economic resource terms (e.g., economic resources, natural resources, capital goods, human resources, factors of production)
3.4.2 List reasons that economic resources are important for business
3.4.3 Explain why natural resources, capital resources, and human resources are limited
3.4.4 Describe ways that businesses respond to limited resources

Competency 3.5: Describe the nature of economics and economic activities
Key Indicators:
3.5.1 Describe economic terms (e.g., economics, scarcity, economizing, opportunity cost, trade-offs, consumption, consumer, production, producer, exchange, distribution)
3.5.2 Discuss why scarcity exists
3.5.3 Describe economic questions that all societies must answer, (e.g., what to produce, how to produce, when to produce)
3.5.4 Explain importance of decision-making in economics
3.5.5 Describe economic activities

Competency 3.6: Explain the principles of supply and demand
Key Indicators:
3.6.1 Describe supply and demand terms (e.g., demand, law of demand, supply, law of supply, law of supply and demand, buyer's market, seller's market, elasticity, elastic demand, inelastic demand)
3.6.2 List the conditions required for demand to exist
3.6.3 Describe how the laws of supply and demand effect business
3.6.4 Identify factors that affect elasticity
3.6.5 Describe factors that affect demand/supply

Competency 3.7: Describe the concept of price
Key Indicators:
3.7.1 Describe pricing terms (e.g., price, relative prices, incentives, rationing, equilibrium price, excess supply, excess demand, market price)
3.7.2 Describe relative prices
3.7.3 Explain significance of relative prices to businesses and to consumers
3.7.4 Discuss relationship of relative prices to the economy
3.7.5 Explain how prices are determined
3.7.6 Explain how producers respond to excess supply/demand

Competency 3.8: Examine characteristics of business
Key Indicators:
3.8.1 Discuss current trends and changing nature of business (e.g., population, social issues)
3.8.2 Describe how competition effects business operations (e.g., local, national, global)
3.8.3 Explore characteristics of a free enterprise system

Competency 3.9: Demonstrate knowledge of business operation
Key Indicators:
3.9.1 Determine factors affecting business risk and profit
3.9.2 Explain concepts of competition and productivity
3.9.3 Analyze impact of specialization/division of labor on productivity

Competency 3.10: Explain concept of organized labor and business
Key Indicators:
3.10.1 Describe labor terms (e.g., labor union, local, national, federation, collective bargaining, strikes, picketing, boycotts, featherbedding, lockouts, injunctions, strikebreakers)
3.10.2 Identify types of labor issues
3.10.3 Classify types of unions and levels of union organization

Competency 3.11: Apply business economic concepts
Key Indicators
3.11.1 Identify economic resources
3.11.2 Analyze the functions of money
3.11.3 Identify the difference between economics and economic activities
3.11.4 Identify the relationship between business, society, and government
3.11.5 Apply the concept of economic goods and services to given business situations
3.11.6 Apply the concept of utility to given business situations
3.11.7 Apply the concept of supply and demand to given business situations
3.11.8 Apply the concepts of competition to given business situations
3.11.9 Apply the concept of price to given business situations
3.11.10 Apply the concept of opportunity cost to given business situations

Competency 3.12: Examine issues related to managing economic resources
Key Indicators:
3.12.1 Identify the types of economic systems
3.12.2 Analyze the interdependence between government and business
3.12.3 Identify the factors that influence management decisions
3.12.4 Track work flow using flow charts

Competency 3.13: Analyze economic indicators and trends
Key Indicators:
3.13.1 Identify business cycles
3.13.2 Investigate the nature of current and past economic problems
3.13.3 Identify leading indicators
3.13.4 Identify lagging indicators

Competency 3.14: Explain measures used to analyze economic conditions
Key Indicators:
3.14.1 Describe: unemployment rate, frictional unemployment, structural unemployment, cyclical unemployment, seasonal unemployment, technological unemployment, full employment, inflation rate, price level, interest rate
3.14.2 Describe cost of unemployment for a nation
3.14.3 Describe causes of inflation and recession

3.14.4 Explain how inflation impacts the economy
3.14.5 Explain the impact of interest rate fluctuations on an economy

Competency 3.15: Explain the role of the Consumer Price Index (CPI) in business
Key Indicators:
3.15.1 Describe Consumer Price Index
3.15.2 Describe how the Consumer Price Index is determined and how it changes
3.15.3 Identify major kinds of consumer spending that make up the Consumer Price Index
3.15.4 Explain how the Consumer Price Index is used to find the rate of inflation
3.15.5 Describe limitations on the use of the Consumer Price Index
3.15.6 Explain how price instability affects economic performance

Competency 3.16: Explain the concept of Gross Domestic Product (GDP)
Key Indicators:
3.16.1 Describe: gross domestic product (GDP), personal consumption expenditures, gross private domestic investment, government purchases of goods and services, net exports of goods and services, trade deficit, trade surplus, uncounted production, underground economy, double counting
3.16.2 Identify categories of goods and services that make up GDP
3.16.3 Describe problems encountered in calculating GDP
3.16.4 Explain importance of a country's GDP
3.16.5 Describe ways to increase GDP

Competency 3.17: Describe the nature of current economic problems
Key Indicators:
3.17.1 Describe: balanced budget, budget deficit, federal budget, comparable worth, deregulation, equal employment, global competition, national debt, pollution, poverty, suburban flight, urban blight
3.17.2 Identify examples of current economic problems that affect a community
3.17.3 Explain causes of current economic problems
3.17.4 Draw conclusions about prices by interpreting the Consumer Price Index over a 10-year period
3.17.5 Determine inflation rates
3.17.6 Calculate unemployment rates
3.17.7 Identify possible solutions to current economic problems

Competency 3.18: Explain the nature of international trade
Key Indicators:
3.18.1 Describe: imports, exports, international trade, absolute advantage, and comparative advantage
3.18.2 Describe reasons that international trade takes place
3.18.3 List gains from international trade
3.18.4 Identify ways in which the U.S. economy is affected by international trade

3.18.5 Describe types of trade barriers
3.18.6 Explain techniques used by governments to improve international trade relations

Competency 3.19: Identify the impact of cultural and social environments on world trade

Key Indicators:

3.19.1 Describe: culture, beliefs, values, assumptions, cultural baggage, business subculture, family unit, gender roles, family-work relationships, mobility, class system, language, customs, social relationships
3.19.2 Explain why business subcultures shape the behaviors of business people
3.19.3 Describe how culture influences the components of social organization
3.19.4 Explain how culture influences communication
3.19.5 Describe the impact of values on culture
3.19.6 Explain the importance of understanding the culture of international trading partners

Competency 3.20: Evaluate influences on a nation's ability to trade

Key Indicators:

3.20.1 Describe: trade sanctions, expropriation, economic nationalism, civil unrest, exchange rates, literacy level, agricultural dependency, industrialized countries, less-developed countries, developing countries, and infrastructure
3.20.2 Describe the impact of political risk on a nation's ability to trade
3.20.3 Explain the impact of economic risks on a nation's ability to trade
3.20.4 Describe factors that affect a nation's ability to trade, (e.g., government policies, geographic location, fluctuating interest rates)
3.20.5 Describe factors that influence a nation's level of economic development
3.20.6 Compare/contrast the economic development of less-developed, developing, and industrialized countries
3.20.7 Explain the impact of a country's infrastructure on its ability to trade

Instructional Unit 4: Business Communications

Competency 4.1: Explain nature of effective communication
Key Indicators:
4.1.1 Explain importance of effective communication in business
4.1.2 Identify characteristics of effective communication
4.1.3 Identify barriers to effective communication
4.1.4 Describe techniques for overcoming barriers to effective communication
4.1.5 Differentiate between fact, judgment, and inference
4.1.6 Discuss issues with electronic communications (e.g., no reflection of voice tone, potential for forwarding information)

Competency 4.2: Apply effective listening skills
Key Indicators:
4.2.1 Describe importance of listening to others
4.2.2 Discuss barriers to effective listening
4.2.3 Explain elements of effective listening
4.2.4 Practice active listening

Competency 4.3: Use proper grammar and vocabulary
Key Indicators:
4.3.1 Use correct subject/verb agreement in sentences
4.3.2 Use correct noun/pronoun agreement in sentences
4.3.3 Use correct use of adverbs and adjectives in sentences
4.3.4 Use correct word usage in sentences
4.3.5 Explain importance of a technical vocabulary
4.3.6 Explain the consequences of excessive use of jargon
4.3.7 Explain relationship of business success to proper grammar
4.3.8 Demonstrate proper use of grammar and vocabulary

Competency 4.4: Explain the nature of effective verbal communication
Key Indicators:
4.4.1 Explain importance of effective verbal communication in business
4.4.2 Describe how nonverbal communication affects verbal messages
4.4.3 Explain importance of voice in communicating with others

Competency 4.5: Address people properly
Key Indicators:
4.5.1 Identify situations in which business employees need to address others in a businesslike manner
4.5.2 Explain importance of addressing others in a businesslike manner

Competency 4.6: **Handle telephone calls in a businesslike manner**
Key Indicators:
4.6.1 Describe proper verbal skills needed to handle telephone calls
4.6.2 Explain standard procedures for taking phone messages
4.6.3 Describe procedures for handling telephone calls in a businesslike manner (e.g., professionalism, consider inflection in voice, attitude conveyed)

Competency 4.7: **Make oral presentations**
Key Indicators:
4.7.1 Identify occasions when oral presentations are required
4.7.2 Explain the importance of communication skills in oral presentations (e.g., speaking clearly, using correct grammar, using appropriate gestures with audience contact)
4.7.3 Describe characteristics of effective oral presentations
4.7.4 Discuss role of visual support in making oral presentations
4.7.5 Demonstrate procedures for making oral presentations
4.7.6 Use technology to enhance oral presentations

Competency 4.8: **Utilize written communication**
Key Indicators:
4.8.1 Explain importance of effective written communication
4.8.2 Prepare written communication
4.8.3 Identify types of written communication used in business
4.8.4 Identify characteristics of effective written communication (e.g., brevity neatness/accuracy when using written communication in business)

Competency 4.9: **Use communication technologies/systems (e.g., e-mail, facsimile transaction [FAX], voice mail, cell phones, conference calling, answering systems, teleconferencing)**
Key Indicators:
4.9.1 Identify communication technologies/systems often used in businesses
4.9.2 Describe benefits of communications technologies/systems
4.9.3 Explain procedures for using communications technologies/systems
4.9.4 Demonstrate use of communications technologies/systems
4.9.5 Discuss legal implications of using electronic equipment

Competency 4.10: **Communicate using telecommunications tools**
Key Indicators
4.10.1 Identify company policies regarding use of telecommunications tools (telephones, answering machine, voice mail, e-mail, teleconferencing systems)
4.10.2 Operate telecommunications equipment in accordance with company policy
4.10.3 Communicate via telephones, voice mail, e-mail, teleconferencing systems
4.10.4 Keep up-to-date concerning new and emerging communications technologies

4.10.5 Take complete and accurate telephone messages
4.10.6 Deliver phone messages according to criticality of message
4.10.7 Follow established telephone etiquette

Competency 4.11: Communicate effectively following company guidelines in the business environment

Key Indicators:

4.11.1 Follow directions
4.11.2 Describe guidelines for communicating with other employees (e.g., protocol of communications, types of information transmitted via different channels of staff communications, importance of effective state communications to business)
4.11.3 Explain use of interdepartmental/company communication
4.11.4 Give directions for completing job tasks
4.11.5 Conduct meetings

Competency 4.12: Demonstrate ethical behavior in workplace communication

Key Indicators:

4.12.1 Respect the privacy of others
4.12.2 Describe ethical considerations in providing information
4.12.3 Demonstrate procedures for treating others fairly in the workplace (e.g., with gender, sexual orientation, physical condition, ethnic heritage, lifestyle, harassment)
4.12.4 Demonstrate guidelines for developing cultural sensitivity

Competency 4.13: Foster positive working relationships

Key Indicators:

4.13.1 Describe work related terms (e.g., human relations, interdependence, defeatist attitude, inferior attitude, superiors attitude, mature attitude, authoritarian leaders, democratic leaders, laissez-faire leaders)
4.13.2 Describe importance of effective human relations at work
4.13.3 Identify skills needed to develop effective relationships
4.13.4 Discuss significance of interdependence among workers
4.13.5 Describe leadership styles
4.13.6 Explain actions employees should take to establish effective working relationships with each leadership style

Competency 4.14: Demonstrate teamwork

Key Indicators:

4.14.1 Distinguish between teams and groups
4.14.2 Identify types of teams used by businesses (e.g., standing committee, short-term committee, quality circles, project teams, work teams)
4.14.3 Explain importance of teams
4.14.4 Participate as a contributing team member

Competency 4.15: Explain nature of positive customer/client relations

Key Indicators:

4.15.1 Discuss importance of positive customer/client relations
4.15.2 Describe techniques for building positive customer/client relations
4.15.3 Explain nature of customer inquiries
4.15.4 Describe guidelines for handling customer inquiries
4.15.5 Demonstrate use of proper procedure for solving a customer inquiry

Competency 4.16: Explain the nature of organizational change

Key Indicators:

4.16.1 Describe types of organizational change (e.g., term organizational change, reactive change, planned change)
4.16.2 Identify forces that create the need for organizational change
4.16.3 Explain barriers to organizational change
4.16.4 Describe management techniques for overcoming the barriers to organizational change
4.16.5 Explain guidelines for implementing planned organizational change

Competency 4.17: Describe the nature of organizational conflict

Key Indicators:

4.17.1 Explain types of conflict within organizations
4.17.2 Explain causes of organizational conflict
4.17.3 Explain consequences of conflict on organizations
4.17.4 Describe steps for conflict resolution

Competency 4.18: Build customer and coworker relations

Key Indicators:

4.18.1 Provide needed information to customers and coworkers in a considerate and respectful manner
4.18.2 Project a professional business image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
4.18.3 Gather information needed for international business communication
4.18.4 Demonstrate business professionalism through the use of appropriate manners in accordance with established protocols and company policies

Competency 4.19: Build customer service

Key Indicators:

4.19.1 Identify organization's products and services including own strengths as a sales agent
4.19.2 Recognize the importance of all customers to the business
4.19.3 Determine customers' individual needs
4.19.4 Interact with customers in a professional manner (e.g., prompt, friendly, courteous, helpful, knowledgeable, understandable)

4.19.5 Follow through on commitments made to customers (e.g., special orders, delivery specifications, new items)
4.19.6 Communicate business policies to customers
4.19.7 Handle merchandise returns in accordance with customer service policy
4.19.8 Handle merchandise complaints in accordance with customer service policy
4.19.9 Facilitate customer service through the maintenance of key information systems
4.19.10 Maintain customer base

Competency 4.20: Deliver business presentations
Key Indicators:
4.20.1 Identify types of presentations for business use
4.20.2 Outline presentations
4.20.3 Enhance presentation delivery using various types of technology
4.20.4 Project a professional business image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)

Competency 4.21: Prepare written business documents
Key Indicators:
4.21.1 Prepare written business documents using various formats (e.g., letters, thank-you notes, acknowledgments, transcripts, memorandums)
4.21.2 Prepare complex written reports (e.g., research, analysis, legal)

Instructional Unit 5: Accounting

Competency 5.1: Complete the accounting cycle

Key Indicators:

5.1.1 Describe terminology in the accounting cycle
5.1.2 Analyze transactions using source documents
5.1.3 Explain double-entry system of accounting
5.1.4 Apply debit and credit rules when analyzing business transactions
5.1.5 Prepare a chart of accounts
5.1.6 Apply debit and credit rules when recording business transactions
5.1.7 Analyze differences in the uses of credit cards, debit cards, installment loans, term loans, and commercial loans
5.1.8 Journalize transactions using various journal formats
5.1.9 Post transactions to general ledger
5.1.10 Post adjustments (e.g., accruals, deferrals)
5.1.11 Prepare a trial balance
5.1.12 Post transactions to subsidiary ledgers
5.1.13 Prepare accounting reports (e.g., balance sheets, income statements, worksheets)
5.1.14 Use spreadsheets and accounting software to maintain accounting records

Competency 5.2: Apply generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity

Key Indicators:

5.2.1 Create/maintain accounts receivable subsidiary ledger
5.2.2 Apply appropriate accounting concepts and techniques for acquisition, depreciation, and disposal of property
5.2.3 Create/maintain accounts payable subsidiary ledger
5.2.4 Record mortgage and lease obligations and subsequent principal and interest payments
5.2.5 Apply appropriate accounting techniques to account for investments and withdrawals by owners
5.2.6 Determine inventory valuation according to different plans including LIFO (last in; first out), FIFO (first in; first out), specific identification, and weighted average

Competency 5.3: Maintain cash control

Key Indicators:

5.3.1 Identify cash control procedures (e.g., signature cards, deposit slips, internal/external controls, check clearing)
5.3.2 Process checks
5.3.3 Reconcile a bank statement
5.3.4 Journalize/post entries to establish and replenish petty cash
5.3.5 Journalize/post entries related to banking activities
5.3.6 Explain the benefits of electronic funds transfer (e.g., automated teller machine [ATM] transactions, debit cards, direct deposits)

Instructional Unit 6: Computation

Competency 6.1: Apply mathematics skills in business operations
Key Indicators:

6.1.1 Solve for unknowns using algebraic equations
6.1.2 Apply number relations (e.g., greater than, less than, equal)
6.1.3 Interpret measurements (e.g., weight, capacity, length, area, volume)
6.1.4 Calculate break-even sales
6.1.5 Calculate discounts and due dates
6.1.6 Calculate percentages
6.1.7 Make estimates based on given data (e.g., time, financial, inventory)
6.1.8 Prove financial data (e.g., checkbooks, cash drawers, accounting forms)

Competency 6.2: Determine mathematical procedures to solve business problems
Key Indicators:

6.2.1 Determine correct mathematical processes to use for various problem situations using correct formula when appropriate
6.2.2 Select/utilize appropriate tools, programs, and/or procedures when solving problems (e.g., calculators, spreadsheets)

Competency 6.3: Use mathematical procedures to calculate wages and benefits
Key Indicators:

6.3.1 Describe math terms/concepts related to the workplace (e.g., gross pay, net pay, Federal Insurance Commission Act [FICA], commissions)
6.3.2 Maintain payroll register and individual earnings records and tax information
6.3.3 Complete employer's quarterly federal tax return/data for employee and employer tax
6.3.4 Calculate fringe benefits
6.3.5 Calculate wage and salary increase plans (e.g., Cost-of-Living Allowance [COLA], merit increases, profit sharing)

Competency 6.4: Interpret data using common statistical procedures
Key Indicators:

6.4.1 Use tables, charts, and graphs (e.g., construct, read, interpret)
6.4.2 Infer data from tables, charts, and graphs
6.4.3 Calculate measures of central tendency (i.e., mean, median, mode)
6.4.4 Construct frequency distribution
6.4.5 Use probability concepts to solve problems involving uncertainty

Competency 6.5: Use mathematical procedures to solve business problems
Key Indicators:

6.5.1 Compute compound interest and the resulting compound amount at the maturity date for savings and investments
6.5.2 Calculate present value of an investment with compound interest
6.5.3 Determine outstanding amount for installment purchases
6.5.4 Determine finance/additional charges, periodic payment, total costs, and APR (annual percentage rate) on an installment contract
6.5.5 Calculate effects of early payoff of an installment plan
6.5.6 Calculate net business purchases with discounts and purchase returns and allowances
6.5.7 Determine dollar amount of markdown, regular selling price, or reduced price when one of the three variables are unknown

Instructional Unit 7: Business Law

Competency 7.1: Examine foundation of business law

Key Indicators:

7.1.1 Explain why laws exist
7.1.2 Compare/contrast ethics, morals, and law
7.1.3 Describe relationship between historical law and current law
7.1.4 Explain use of the *Constitution* and *Bill of Rights* as sources of law
7.1.5 Compare/contrast the United States Constitution with state and local law
7.1.6 Match regulatory agencies with their responsibilities
7.1.7 Describe rights and responsibilities of customers/clients
7.1.8 Compare/contrast the American business law system with systems in other developed countries

Competency 7.2: Explore the American legal system

Key Indicators:

7.2.1 Compare/contrast federal, state, and local court systems
7.2.2 Describe concept of jurisdiction
7.2.3 Explain how jurisdiction applies to the court system
7.2.4 Identify various categories of law (e.g., civil, criminal, corporate)
7.2.5 Compare/contrast the sources of international law
7.2.6 Distinguish between the roles of legal professionals (e.g., judges, lawyers, paralegals)
7.2.7 Explain role of the appellate and supreme courts
7.2.8 Describe how the litigation process works
7.2.9 Explain the advantages and disadvantages of arbitration, mediation, and conciliation
7.2.10 Describe statute of limitations
7.2.11 Identify different areas of civil law that impact businesses (e.g., tort, contract, property law)
7.2.12 Describe different types of business crime (e.g., arson, forgery, embezzlement, insurance fraud, trademark/copyright)

Competency 7.3: Describe the difference between ethics and the law

Key Indicators:

7.3.1 Explain relationship between the law and ethics
7.3.2 Identify consequences of unethical and illegal conduct
7.3.3 Describe effects of ethics in business

Competency 7.4: Discuss the relationships between contract law, law of sales, and consumer law

Key Indicators:

7.4.1 List elements required to create a contract
7.4.2 Determine whether the characteristics of enforceable contract exists
7.4.3 List the ways a contract can be discharged

7.4.4 Describe breach of contract
7.4.5 Differentiate between goods, service, and real property contracts
7.4.6 Identify various types of warranties and how each of the warranties may be excluded or modified
7.4.7 Explain remedies when a breach of contract occurs
7.4.8 Identify rights and responsibilities of consumers
7.4.9 Identify reasons for bankruptcy laws
7.4.10 Explain representation
7.4.11 Describe the different types of bankruptcy (e.g., chapter 7, 11, 13)

Competency 7.5: Describe legal aspects of business formation
Key Indicators:
7.5.1 Identify types of business ownership
7.5.2 Describe powers and duties of partners
7.5.3 Distinguish between the different types of partners (e.g., silent, dormant, secret)
7.5.4 Outline legal procedures for forming and running a sole proprietorship, limited liability company, and general partnership
7.5.5 Describe legislation that affects partnerships (e.g., Uniform Partnership Act Revised Uniform Partnership Act)
7.5.6 Identify how a partnership may be dissolved by the acts of the partners, operation of the law, and order of the court
7.5.7 Explain the difference between a foreign and domestic corporation
7.5.8 Differentiate between types of corporations (e.g., profit, nonprofit, domestic, foreign, alien corporations)
7.5.9 Describe functions of the board of directors/trustees and officers of a corporation with regard to control of corporate affairs
7.5.10 Differentiate between common and preferred stock
7.5.11 Differentiate between types of corporate expansion (e.g., mergers, consolidations, conglomerates)
7.5.12 Describe ways corporate existence may be dissolved
7.5.13 Describe characteristics of a franchise and how it is formed
7.5.14 Describe legal documents necessary to operate a company (e.g., by-laws, code of regulations)

Competency 7.6: Describe functions of commercial paper, insurance, secured transactions, and business bankruptcy
Key Indicators:
7.6.1 Explain essential elements of a negotiable instrument
7.6.2 Describe different types of endorsements
7.6.3 Explain contractual relationship between a bank and its customers
7.6.4 Describe legal effect of forgeries and material alterations
7.6.5 Explain difference between negotiation of order paper and negotiation of bearer paper
7.6.6 Compare different types of life insurance (e.g., ordinary, limited payment, endowment, term)

7.6.7 Compare different types of property insurance (e.g., automobile, homeowner's, marine)
7.6.8 Explain differences in health insurance coverage
7.6.9 Describe a secured transaction
7.6.10 Describe collateral (e.g., secured and unsecured)
7.6.11 Discuss various aspects of business bankruptcy (e.g., Chapter 7—Liquidation, Chapter 11—Reorganization, and Chapter 13—Reorganization of Debts)
7.6.12 Describe the Uniform Commercial Code
7.6.13 Describe how secured transactions must be recorded to make them enforceable (e.g., State Secretary of State, County Recorder's Office)
7.6.14 Explain trademark and copyright law
7.6.15 Describe federal agencies which monitor corporate transactions
7.6.16 Explain a security
7.6.17 Explain the primary function of the United States Securities Exchange Commission and the National Association of Securities Dealers
7.6.18 Name/describe the federal acts with which companies and individuals must comply in order to sell securities
7.6.19 Describe the due diligence process

Instructional Unit 8: Technology

Competency 8.1: Utilize computer hardware
Key Indicators:
8.1.1 Identify different types of computers
8.1.2 Describe how computers work and process information
8.1.3 Explain how individual computers fit into large systems
8.1.4 Identify the function of computer hardware components
8.1.5 Identify common problems associated with individual components
8.1.6 Identify issues related to computer performance and how it is affected by different components of the computer
8.1.7 Identify the factors that go into a decision on how to purchase a computer

Competency 8.2: Discuss various types of computer software
Key Indicators:
8.2.1 Identify how software works and how software and hardware work together to perform computing tasks
8.2.2 Identify different types of software (e.g., presentation software, accounting software, database software, scheduling software, instant messaging, video conferencing, virus protection software, image manipulation software, document management software)
8.2.3 Describe the tasks for which each type of software is most suited

Competency 8.3: Use computer operating systems
Key Indicators:
8.3.1 Identify types of operating systems
8.3.2 Describe how an operating system works
8.3.3 Manipulate the vendor-specific desktop, files, and disks
8.3.4 Be able to change system settings
8.3.5 Install/uninstall software

Competency 8.4: Use applications
Key Indicators:
Common Program Functions
8.4.1 Start/exit a vendor-specific application
8.4.2 Utilize sources of online help
8.4.3 Identify common on-screen elements of vendor-specific applications
8.4.4 Change applications settings
8.4.5 Manage files within an application
8.4.6 Perform common editing (e.g., cut, copy, paste, spellcheck)
8.4.7 Perform common printing functions

Word Processing Functions

8.4.8 Format text and documents
8.4.9 Utilize automatic formatting or override automatic formatting
8.4.10 Add tables and graphics to documents

Spreadsheet Functions

8.4.11 Modify worksheet data and structure
8.4.12 Sort data and manipulate data using formulas and functions
8.4.13 Format a worksheet
8.4.14 Add pictures and charts to a worksheet

Competency 8.5: Utilize on-line functions

Key Indicators:

8.5.1 Access networks and the Internet
8.5.2 Identify network fundamentals and the benefits and risks of network computing
8.5.3 Identify the relationship between computer networks, other communication networks (telephone), and the Internet

Competency 8.6: Utilize electronic mail

Key Indicators:

8.6.1 Identify how electronic mail works
8.6.2 Identify how to use an electronics mail application
8.6.3 Identify the appropriate use of e-mail
8.6.4 Discuss e-mail related etiquette
8.6.5 Send/receive/store e-mail messages

Competency 8.7: Utilize the Internet

Key Indicators:

8.7.1 Identify different types of information sources on the Internet
8.7.2 Use a Web browsing application
8.7.3 Search the Internet for information

Competency 8.8: Assess impact of technology on the workplace

Key Indicators:

8.8.1 Explain the benefits and drawbacks of technological advancements
8.8.2 Describe how new developments in technology affect the supply/demand characteristics of the job market
8.8.3 Describe how technology has changed organization structures
8.8.4 Describe how technology has transformed business processes and relationships
8.8.5 Describe how technology has changed the manner in which training is offered and implemented
8.8.6 Evaluate technological developments that have changed the way people perform their tasks and assignments

8.8.7 Research future trends in technology
8.8.8 Determine current technology needs for various types of businesses

Competency 8.9: Use references and data from technological sources (e.g., gather, evaluate, use, cite)

Key Indicators:

8.9.1 Use technology resources to retrieve information, (e.g., compact discs, Internet, DVDs [Digital Video Disc])
8.9.2 Use search procedures appropriate to type of information, nature of source, and nature of query
8.9.3 Evaluate credibility and bias of information sources
8.9.4 Use information in decision making
8.9.5 Cite sources of all types of data

Competency 8.10: Adhere to laws governing technology

Key Indicators:

8.10.1 Determine when a software program can be protected by labeling it a trade secret
8.10.2 Determine when a software program can be protected by a patent or copyright
8.10.3 Identify the circumstances that constitute the violation of a software program copyright
8.10.4 Determine when computer-related contracts are service contracts and when they are sale-of-goods contracts
8.10.5 Explain how the law can be used to prevent the use of computers to invade privacy
8.10.6 Discuss impact of the laws of different countries on computer law

Competency 8.11: Develop skills and knowledge needed to obtain technical support services

Key Indicators

8.11.1 Use a logical and structured approach to isolate and identify problem sources and resolve problems
8.11.2 Use resources for problem identification and resolution (e.g., hardware, software, online)
8.11.3 Use technical computer language to communicate with support technicians
8.11.4 Recognize need to maintain technical currency and the need to grow professionally

Competency 8.12: Abide by risk-management policies and procedures for technology

Key Indicators:

8.12.1 Adhere to safety and security policies (e.g., acceptable use policy, Web page policies)
8.12.2 Apply ergonomic techniques to technology tasks
8.12.3 Adhere to federal and state laws that apply to safety and security including laws pertaining to computer crime, fraud, and abuse

8.12.4 Follow procedures used to restart and recover from situations (e.g., system failure, virus infection)
8.12.5 Follow policies regarding controls to prevent loss of integrity of data and other information resources

Competency 8.13: Follow policies for managing privacy and ethical issues in organizations

Key Indicators:

8.13.1 Adhere to organization policies for privacy and intellectual property
8.13.2 Demonstrate legal and ethical behaviors when using technology
8.13.3 Explain consequences of illegal and unethical use of technology
8.13.4 Explain property, privacy, access, and accuracy issues pertaining to technology, including the impact of these issues on individuals and organizations

Competency 8.14: Apply technology to business applications

Key Indicators:

8.14.1 Determine the appropriate software application for task
8.14.2 Apply advanced word processing skills to design work place documents (e.g., mail merge, tables, macros, envelopes, labels)
8.14.3 Design and manage database for workplace applications (e.g., query, filter, sort, merge, reports)
8.14.4 Design spreadsheets for workplace applications (e.g., templates, macros, formulas, functions, graphs, charts, links)
8.14.5 Produce multimedia presentation for the workplace (e.g., sound bytes, animation, transition, image download or import, video)
8.14.6 Produce workplace documents using desktop publishing software
8.14.7 Manipulate image files
8.14.8 Create a webpage for business applications
8.14.9 Maintain electronic files (e.g., server, workstation, shared files)
8.14.10 Capture text using OCR (optical character reader) software
8.14.11 Produce documents using voice recognition technology
8.14.12 Maintain and troubleshoot computer workstation (e.g., install software, download plug-ins, defrag hard drive, run scan disk, delete temporary and other unnecessary files, change ink cartridges and toner, scan for viruses, troubleshoot common problems)
8.14.13 Complete workplace applications that integrate word processing (e.g., spreadsheets, database, multimedia software)

Competency 8.15: Use Internet as a business tool

Key Indicators:

8.15.1 Distinguish between Internet and Intranet
8.15.2 Use e-mail to send and receive messages and attachments
8.15.3 Demonstrate appropriate Internet uses for business (e.g., copyright, netiquette, privacy issues, ethics)

8.15.4 Analyze basic components of an electronic business website
8.15.5 Identify advantages and disadvantages of electronic business procedures (e.g., e-commerce)

Instructional Unit 9: International Business

Competency 9.1: Explain impact of international business
Key Indicators:
9.1.1 Describe impact of international business activities on the local, state, national, and international economics
9.1.2 Discuss impact of emerging economies and political changes on international operations
9.1.3 Determine impact of geography on international business (e.g., climate; time zones, distance; topography; and social, economic, religion, natural resources)
9.1.4 Explain relationships of major trade alliances with each other

Competency 9.2: Apply communication strategies necessary for effective and profitable international business relations
Key Indicators:
9.2.1 Identify basic words and phrases in languages used in business throughout the world
9.2.2 Identify business challenges related to people speaking various languages
9.2.3 Explain conversation modifications for communicating with a person who speaks English as a second language
9.2.4 Explain the usage of names, titles, and ranks in different cultures and countries
9.2.5 Discuss international business blunders resulting from ineffective or incorrect communication patterns
9.2.6 Identify cultural differences in food, dress, and social behaviors throughout the world
9.2.7 Identify major holidays of various cultures and the impact on doing business internationally
9.2.8 Identify appropriate use of gift giving in business relationships in various cultures
9.2.9 Compare business protocol in various countries
9.2.10 Identify cultural attitudes about time, silence, space, and body and eye contact in relation to successful international business relationships
9.2.11 Describe how process of negotiating may be affected by cultural differences
9.2.12 Describe role and use of electronic communication tools (e.g., Internet, video-and computer-conferencing, webcasts, email) in international business activities

Instructional Unit 10: Management

Competency 10.1: Identify business management practices

Key Indicators:

10.1.1 Identify functions of management

10.1.2 Identify management levels and their role in the organization

10.1.3 Identify areas of management and their relationship to business functions (e.g., human resources, financial, facility inventory, information systems, logistics, accounting)

Competency 10.2: Discuss management functions and their integration within the business functions

Key Indicators:

10.2.1 Identify key management functions (e.g., planning, organizing, leading/directing, evaluating/controlling)

10.2.2 Discuss importance of vision, mission, and goal setting within the context of the business environment

10.2.3 Describe role of the strategic planning process

10.2.4 Identify business plan components

10.2.5 Explain how management uses various resources in the organizing process to accomplish goals

10.2.6 Describe how organizations provide accountability by delegating authority and assigning responsibility

10.2.7 Differentiate between leading and managing

10.2.8 Discuss various leadership styles

10.2.9 Discuss management skills necessary for leading/directing at various management levels

10.2.10 Discuss importance of the evaluating/controlling function in the business environment

10.2.11 Discuss alternative actions when goals are not being met for a specific situation (e.g., changing goals and strategies)

10.2.12 Discuss measurements of performance

10.2.13 Identify the impact that various employment and social laws may have on leading and managing business

Competency 10.3: Explain management theories and their application with the business environment

Key Indicators:

10.3.1 Discuss management theories

10.3.2 Identify motivation theories that impact management (e.g., Maslow and Herzberg)

10.3.3 Describe interaction between management levels

10.3.4 Discuss interrelationships of a variety of organizational models (e.g., line, line and staff, functional)

10.3.5 Describe line versus staff departments and the authority relationship between them

10.3.6 Describe effects of group dynamics on group decision making and consensus building

Competency 10.4: Describe human resource functions and their importance to an organization's successful operation

Key Indicators:

10.4.1 Identify activities of the human resource unit
10.4.2 Describe how workplace legislation has changed the workplace (e.g., Affirmative Action, Right-to-privacy, Americans with Disabilities Act [ADA])
10.4.3 Identify tools used in the recruitment and selection of employees
10.4.4 Identify legislation affecting the recruitment and selection process
10.4.5 Explain why orientation and training are needed for successful employee performance
10.4.6 Discuss why professional development is a shared responsibility between a business and an employee
10.4.7 Identify value of cross-training
10.4.8 Explain employee evaluation process
10.4.9 Identify impact of performance appraisals on employees
10.4.10 Identify compensation plans, benefit packages, and incentive programs available to employees
10.4.11 Identify advancement opportunities within an organization
10.4.12 Discuss concept of rightsizing
10.4.13 Discuss how internal and external factors affect rightsizing (e.g., economy, compensation, government regulations)
10.4.14 Describe collective-bargaining process
10.4.15 Explain the changing roles of labor unions
10.4.16 Describe legal strategies used by labor and management (e.g., strikes, boycotts, layoffs, lockouts)

Instructional Unit 11: Marketing

Competency 11.1: Explain impact of marketing activities on the individual, business, and society

Key Indicators:

11.1.1 Describe how a successful marketing strategy is built on positive customer relations
11.1.2 Identify elements of the marketing mix (e.g., product, price, place, promotion)
11.1.3 Describe the wide scope of marketing (e.g., business-to-consumer, business-to-business, industrial, nonprofit, personal, government, electronic)
11.1.4 Describe importance of marketing in a global society

Competency 11.2: Describe characteristics, motivations, and behaviors of consumers

Key Indicators:

11.2.1 Describe impact of consumer differences (e.g., life stages and socioeconomic characteristics) on buying decisions
11.2.2 Differentiate among types of consumers and other types of consumers (e.g., government, business, industry, nonprofit)
11.2.3 Describe characteristics of the changing domestic and global population (e.g., demographics, ethnographics, geographic, psychographics)
11.2.4 Differentiate between rational (cognitive) and emotional (affective) buying motives
11.2.5 Identify ways that appearance of business (to include professional offices, online businesses, and in-store businesses) impact a customer's perceptions and expectations
11.2.6 Identify the tools of market segmentation (e.g., demographics, ethnographics, psychographics, geographics)
11.2.7 Explain ways that segmentation can be used to identify target markets

Competency 11.3: Describe influence of external factors on marketing

Key Indicators:

11.3.1 Discuss impact of changing economic conditions on marketing strategies
11.3.2 Describe ways competition affects marketing decisions
11.3.3 Explain competitive situations and impact they have on marketing decisions (e.g., monopolistic, oligopolistic, pure competition)
11.3.4 Identify special interest groups concerned with marketing policy (e.g., stockholders, consumer groups, labor groups, environmental groups)
11.3.5 Discuss ways in which marketers may respond to the concerns of special interest groups

Competency 11.4: Discuss elements of the marketing mix and how they are used in the marketing process

Key Indicators:

11.4.1 Identify elements of the marketing mix (e.g., products, price, place, promotion)
11.4.2 Discuss each element and how it is interrelated with other elements of the marketing mix

Competency 11.5: Describe elements, design, and purposes of the marketing plan
Key Indicators:

11.5.1 Explain why a marketing plan is essential
11.5.2 Identify the components of a marketing plan
11.5.3 Discuss why a marketing plan is not a static document

Competency 11.6: Evaluate marketing concepts
Key Indicators:

11.6.1 Identify marketing functions and related activities
11.6.2 Analyze market segmentation and its role in the marketing plan
11.6.3 Identify the purposes and functions of the marketing plan
11.6.4 Analyze the effects of marketing
11.6.5 Identify current trends in marketing and their effects on business operations
11.6.6 Analyze promotional planning strategies

Competency 11.7: Examine the role of the selling process
Key Indicators:

11.7.1 Identify the elements necessary to convey a professional appearance and businesslike image
11.7.2 Determine strategies for identifying your audience/clients and their needs and motives
11.7.3 Determine strategies for analyzing competitors' offerings
11.7.4 Identify sales support services and the benefits for customers
11.7.5 Interpret business policies so they can be understood by customers/clients
11.7.6 Demonstrate knowledge of products/services
11.7.7 Determine strategies for feature-benefit selling
11.7.8 Identify the important of each person's role in the selling process

Instructional Unit 12: Entrepreneurship

Competency 12.1: Identify factors to be considered by a potential entrepreneur

Key Indicators:

12.1.1 Identify characteristics of a successful entrepreneur
12.1.2 Examine rewards and risks of owning a business
12.1.3 Discuss trade-offs between the roles of a manager and an entrepreneur
12.1.4 Identify unique contributions of entrepreneurs to the economy of a country
12.1.5 Explain feasibility of starting a home-based or Internet-based business
12.1.6 Describe the different styles of hierarchy
12.1.7 Review roles of each level of the hierarchy
12.1.8 Explain how each level of the hierarchy impacts the business

Competency 12.2: Apply economic concepts when making decisions for an entrepreneurial venture

Key Indicators:

12.2.1 Compare/contrast the different types of market structures (e.g., competition, monopoly)
12.2.2 Assess how market prices ration goods and services among those who want them
12.2.3 Assess how market prices provide an incentive to produce goods and services
12.2.4 Discuss how prices are determined for products/services

Competency 12.3: Discuss how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures

Key Indicators:

12.3.1 Compare rewards and risks of buying an existing business, starting an entirely new business, or purchasing a franchise
12.3.2 Compare rewards and risks of the various forms of business ownership
12.3.3 Identify impact of government regulations on business
12.3.4 Identify strategies that facilitate ethical behavior in a small business
12.3.5 Identify potential consequences of unethical business practices

Competency 12.4: Analyze financial data

Key Indicators:

12.4.1 Analyze financial reports both electronically and manually (e.g., profit/loss statements, balance sheets)
12.4.2 Evaluate cost-profit relationships
12.4.3 Predict financial outcomes relative to business decisions and financial data

Competency 12.5: Analyze credit issues

Key Indicators:

12.5.1 Analyze differences in the uses of credit cards, debit cards, installment loans, term loans, and commercial loans
12.5.2 Determine factors involved in issuing credit
12.5.3 Identify the components of credit reports

Competency 12.6: Develop a financial plan

Key Indicators:

12.6.1 Identify components of a financial plan
12.6.2 Compare various sources of capital and types of loans
12.6.3 Compare methods of financing given business and personal endeavors
12.6.4 Set long-term financial goals and objectives (e.g., business, personal)

Competency 12.7: Perform banking functions

Key Indicators:

12.7.1 Maintain a checkbook using proper reconciliation methods
12.7.2 Complete bank deposits/records
12.7.3 Inspect currency for counterfeit bills, check authenticity, credit card fraud, smart card fraud, check card fraud, and electronic currency fraud
12.7.4 Calculate the cost of accepting credit cards

Competency 12.8: Apply analytical skills in business operations

Key Indicators:

12.8.1 Determine information needed to solve problems and make decisions
12.8.2 Determine whether information is sufficient, insufficient, or extraneous when solving business problems
12.8.3 Interpret data to solve problems and make decisions
12.8.4 Apply information from tables, charts, and graphs to problem solving and decision-making
12.8.5 Interpret work-flow and organizational charts
12.8.6 Apply logic skills to business decisions

Competency 12.9: Identify key elements of business organizations

Key Indicators:

12.9.1 Identify the parts of a business plan
12.9.2 Identify the relationship between the business plan and the business organization
12.9.3 Identify current trends in various industries
12.9.4 Identify types of business ownership and the characteristics of each
12.9.5 Identify advantages and disadvantages of various types of business ownership
12.9.6 Identify forms of international business activities
12.9.7 Identify barriers of international trade

Competency 12.10: Identify business management practices

Key indicators:

12.10.1 Identify functions of management
12.10.2 Identify management levels and their role in the organization
12.10.3 Identify areas of management (e.g., human resources, financial, facility, inventory, information systems, logistics)

Competency 12.11: Perform scheduling functions

Key Indicators:

12.11.1 Maintain appointment calendars (e.g., written and electronic)
12.11.2 Maintain schedules
12.11.3 Manage scheduling conflicts
12.11.4 Create calendar/schedule of activities (itineraries)
12.11.5 Identify the need for management across projects

Competency 12.12: Conduct meetings and other group functions

Key Indicators:

12.12.1 Plan meetings
12.12.2 Apply parliamentary procedure
12.12.3 Schedule meetings
12.12.4 Prepare agendas
12.12.5 Make necessary meeting room arrangements
12.12.6 Make arrangements for participants' special needs (e.g., dietary, hearing, vision, handicap access, foreign language needs)
12.12.7 Facilitate meetings
12.12.8 Participate in group discussions and meetings
12.12.9 Communicate roles and responsibilities of committee members and officers

Competency 12.13: Maintain a records management system

Key Indicators:

12.13.1 Develop a system for maintaining necessary company records
12.13.2 Maintain secured and protected filing systems
12.13.3 Store materials within appropriate filing systems
12.13.4 Retrieve requested materials from established filing systems
12.13.5 Archive materials according to company policy
12.13.6 Purge filing systems in accordance with company policy

Competency 12.14: Manage inventory

Key Indicators:

12.14.1 Select inventory control systems(s) (e.g., periodic, perpetual, LIFO [last in, first out], FIFO [first in, first out]) appropriate for inventory needs
12.14.2 Maintain inventory control records and systems

12.14.3 Identify reasons for inventory shrinkage
12.14.4 Prepare inventory records and reports

Competency 12.15: Examine personnel management concepts
Key Indicators:
12.15.1 Identify effective skills and strategies for working with organization and groups of people
12.15.2 Identify the kinds of rewards, incentives, and motivators people seek at work
12.15.3 Identify the roles of formal and informal groups within organizations
12.15.4 Identify the role of performance evaluations

Competency 12.16: Perform shipping and mailing functions
Key Indicators:
12.16.1 Identify various classes of mail and shipments
12.16.2 Identify various shipping services (e.g., priority, insured, certified, registered, overnight)
12.16.3 Identify types of shipping and mailing services (e.g., United Parcel Service [UPS], US Postal Services, private carriers)
12.16.4 Sort/distribute mail or shipments
12.16.5 Identify delivery requirements (e.g., package, domestic, international)
12.16.6 Select delivery method and services appropriate for needs

Business Management TCP

Instructional Unit 1: Professional Development and Networking

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.1: Explore career pathways in business management

Key Indicators:

1.1.1 Identify current and future career options and earning potential for a person trained in business management
1.1.2 Research historical evolution of the various careers in business management
1.1.3 Identify education and training needed for a career in business management
1.1.4 Identify personal characteristics required for a person to work as a business management professional

BIL: Essential

EDU:	12	AD
	I	P

Competency 1.2: Explore professional development opportunities for a business management professional

Key Indicators:

1.2.1 Research continuing education courses or programs available to enhance skills, to remain current in the profession, and for career advancement
1.2.2 Describe various certifications for business management professionals (e.g., American Management Association [AMA], American National Standards Institute [ANSI],)
1.2.3 Identify professional association opportunities and the resources they offer for business management professionals (e.g., educational opportunities, networking, conferences, newsletters, publications)
1.2.4 Identify professional and trade journals for business management
1.2.5 Build internal/external mentor relationships
1.2.6 Use websites for professional development
1.2.7 Identify networking opportunities internally and externally
1.2.8 Interact with other professionals
1.2.9 Establish professional relationships

BIL: Essential

EDU:	12	AD
	I	P

Competency 1.3: Utilize professional resource materials

Key Indicators:

1.3.1 Determine business management resources to maintain professional skills (e.g., continuing education, professional associations, course work)
1.3.2 Identify business management publications (e.g., books, periodicals, newsletters)
1.3.3 Discriminate among types of information (e.g., essential, important, critical, nice to know)
1.3.4 Determine validity and reliability of resources
1.3.5 Utilize reading skills according to information needs (e.g., skim, comprehend, analyze)
1.3.6 Maintain resource files

Instructional Unit 2: Professional Effectiveness

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.1: Function as a self-managed employee
Key Indicators:
2.1.1 Propose projects
2.1.2 Organize/prioritize tasks
2.1.3 Manage/prioritize time
2.1.4 Meet deadlines
2.1.5 Maintain business records
2.1.6 Make long-term and short-term plans
2.1.7 Evaluate progress
2.1.8 Report progress
2.1.9 Delegate projects
2.1.10 Acquire appropriate licenses/registrations/credentials

BIL: Essential

EDU:	12	AD
	P	

Competency 2.2: Follow intellectual property rights and copyright laws
Key Indicators:
2.2.1 Explain purpose of patent
2.2.2 Explain purpose of copyright
2.2.3 Explain purpose of licenses
2.2.4 Explain purposes of trademarks
2.2.5 Explain rights of the originator
2.2.6 Explain rights of the public
2.2.7 Maintain confidentiality
2.2.8 Explain legal ownership of proprietary material
2.2.9 Describe stock image/text usage rights
2.2.10 Explain implications of property rights and copyright laws on negotiation of contracts
2.2.11 Follow reproduction licensing and residual usage laws

BIL: Essential

EDU:	12	AD
	P	

Competency 2.3: Achieve organizational goals

Key Indicators:

2.3.1 Evaluate personal goals in relation to organizational goals
2.3.2 Monitor progress by evaluating feedback of co-workers and supervisors
2.3.3 List responsibilities in relation to organizational goals
2.3.4 Accomplish assigned tasks
2.3.5 Exercise responsibility in relation to organizational goals
2.3.6 Set appropriate performance standards
2.3.7 Communicate goals with supervisor/peers
2.3.8 Exhibit knowledge of products and services
2.3.9 Promote organizational image and mission
2.3.10 Promote customer satisfaction, profitability, process improvement, and employee satisfaction

BIL: Essential

EDU:	12	AD
	P	

Competency 2.4: Maintain a safe working environment

Key Indicators:

2.4.1 Analyze relationship between safety, productivity, and health
2.4.2 Explain health and safety standards established by government agencies
2.4.3 Ensure compliance with government and/or company rules and regulations related to health and safety (e.g., ergonomics, OSHA [Occupational Safety and Health Administration], Bureau of Workers Compensation)
2.4.4 Access needed safety information using company and manufacturers' references
2.4.5 Establish preventative measures for dealing with the main causes of accidents in the work environment
2.4.6 Establish preventative measures for dealing with the main causes of health problems in the work environment
2.4.7 Establish preventative measures for dealing with violations of personnel security
2.4.8 Ensure maintenance of a clean work area
2.4.9 Perform safety inspections and audits
2.4.10 Solve safety problems
2.4.11 Maintain a safe environment for all employees (e.g., diverse backgrounds, different cultures, various ages)

BIL: Essential

EDU:	12	AD
	I	P

Competency 2.5: Maintain company security

Key Indicators:

2.5.1 Access needed security information using company references
2.5.2 Plan security procedures in accordance with business ethics
2.5.3 Document security procedures
2.5.4 Communicate security procedures internally
2.5.5 Ensure compliance with security procedures
2.5.6 Perform security checks
2.5.7 Correct security problems
2.5.8 Develop a disaster recovery plan for all levels of the business
2.5.9 Maintain confidentiality of customer information/records

Instructional Unit 3: General Administrative Functions

BIL: Essential

EDU:	12	AD
	P	

Competency 3.1: Maintain work flow

Key Indicators:

3.1.1 Organize work
3.1.2 Prioritize work
3.1.3 Apply time-management techniques
3.1.4 Complete assigned tasks in a timely manner
3.1.5 Coordinate with team members

BIL: Essential

EDU:	12	AD
	P	

Competency 3.2: Perform telecommunications operations

Key Indicators:

3.2.1 Use telephone etiquette
3.2.2 Operate office equipment
3.2.3 Listen actively
3.2.4 Verify information
3.2.5 Record messages
3.2.6 Place calls
3.2.7 Organize teleconferences
3.2.8 Use voice mail/messaging systems (e.g., operation, etiquette, speech clarity, brevity)
3.2.9 Operate fax/modem machines
3.2.10 Use e-mail
3.2.11 Use Internet communication services
3.2.12 Use videoconference facilities
3.2.13 Enforce use of telecommunication for business purposes only

BIL: Essential

EDU:	12	AD
	P	

Competency 3.3: **Perform scheduling functions**

Key Indicators:

3.3.1 Create calendar/schedule using manual and electronic media (e.g., personal digital assistant [PDA])
3.3.2 Maintain appointment calendar with addresses, e-mail addresses, and phone numbers using manual and electronic media
3.3.3 Verify appointments
3.3.4 Manage commitments in a timely manner

BIL: Essential

EDU:	12	AD
	P	

Competency 3.4: **Manage records**

Key Indicators:

3.4.1 Implement filing system appropriate for media/documents being stored
3.4.2 Implement retention system appropriate for media/documents being stored
3.4.3 Identify best method of records management (e.g., paper, electronic, geographic, chronological, alphabetically)
3.4.4 Perform electronic/manual filing operations
3.4.5 Maintain inventory records
3.4.6 Retrieve files
3.4.7 Archive information according to retention procedures
3.4.8 Perform periodic audit of records (e.g., retention, purge, security, storage method)
3.4.9 Maintain personnel records
3.4.10 Research human resource information systems (e.g., HRIS)

Instructional Unit 4: Management

BIL: Essential

EDU:	12	AD
	P	

Competency 4.1: Describe business management
Key Indicators:

4.1.1 Explain purpose of management in a business organizations (e.g., leader, manager, organizer, spokesperson, problem solver, profit-maker)
4.1.2 Identify management roles and situations in which managers perform in various roles and levels
4.1.3 Describe various functions of management (e.g., planning, leading, organizing, delegating, controlling)

BIL: Essential

EDU:	12	AD
	P	

Competency 4.2: Demonstrate management skills and responsibilities
Key Indicators:

4.2.1 Outline functions of management that are needed to complete a given task
4.2.2 Contrast the difference between leadership and management
4.2.3 Identify different leadership styles and their characteristics
4.2.4 Determine when to use the various leadership styles
4.2.5 Write goals that meet criteria (e.g., specific, measurable, achievable, realistic, time bound)
4.2.6 Demonstrate organizational skills
4.2.7 Apply problem-solving approach in making decisions
4.2.8 Investigate the impact of new technology on the workforce
4.2.9 Investigate current trends in business (e.g., acquisition/downsizing, e-commerce, data mining, labor market, social issues)
4.2.10 Analyze the physical layout of an office or business for its maximum efficiency

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.3: **Develop strategies to achieve company goals/objectives**
Key Indicators:
4.3.1 Describe importance of strategies in achieving company goals/objectives
4.3.2 Explain the relationship between strategies and goals/objectives
4.3.3 Demonstrate procedures for developing strategies to achieve company goals/objectives
4.3.4 Develop an action plan that states goals, strategies, and objectives
4.3.5 Demonstrate the ability to budget and make a profit
4.3.6 Demonstrate ability to work successfully with customers
4.3.7 Develop negotiation skills

BIL: Essential

EDU:	12	AD
	P	

Competency 4.4: **Develop a personnel organizational plan**
Key Indicators:
4.4.1 Identify information obtained from organizational plans
4.4.2 Describe purposes of organizational plans
4.4.3 Explain guidelines for developing a personnel organizational plan
4.4.4 Use guidelines in creating an organizational plan
4.4.5 Determine staff and resource needs
4.4.6 Develop a staffing/organizational plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.5: **Develop a management plan for a business**
Key Indicators:
4.5.1 Develop a vision for a business
4.5.2 Create a mission statement for a business
4.5.3 Develop strategies for achieving the vision for a business
4.5.4 Establish goals and objectives for a business
4.5.5 Analyze exit plan options for a business
4.5.6 Identify skills and qualities needed for specific jobs and careers
4.5.7 Diagram organizational structure of a planned business

4.5.8 Hire employees to staff various departments
4.5.9 Design hiring procedures for a specific job
4.5.10 Develop job descriptions for positions in a business
4.5.11 Identify situations where outsourcing should be used for hiring needs
4.5.12 Plan human resource needs and determine the types of employees required
4.5.13 Identify sources of personnel for a small business
4.5.14 Describe role of compensation in relation to productivity when hiring individuals
4.5.15 Assess alternatives to hiring permanent full-time employees

BIL: Recommend

EDU:	12	AD
		I

Competency 4.6: Apply internal environmental scanning techniques
Key Indicators:
4.6.1 Collect information and feedback to help assess the organization's strategic planning and policy-making processes
4.6.2 Interpret internal operations information for strategic planning and policy making (e.g., financial/accounting, marketing, operations, information technology and individual employee data)
4.6.3 Interpret information related to the general business environment, industry practices and developments, and technological developments from external sources in order to participate in strategic planning and policy making (e.g., publications, government documents, media, and trade organizations)
4.6.4 Evaluate HR's contribution to organizational effectiveness, including assessment, design, implementation, and evaluation of activities with respect to strategic and organizational objectives

BIL: Recommend

EDU:	12	AD
		I

Competency 4.7: Apply external environmental scanning techniques
Key Indicators:
4.7.1 Collect information from key business and industry sources in regards to practices and developments
4.7.2 Interpret information related to the general business environment, industry practices and developments, and technological developments from external sources in order to participate in strategic planning and policy making (e.g., publications, government documents, media, trade organization data)
4.7.3 Establish relationships/alliances with key individuals and groups to share best-practices

BIL: Recommend

EDU:	12	AD
		I

Competency 4.8: Evaluate applicability of internal and external scanning to business goals and objectives

Key Indicators:

4.8.1 Identify programs and processes to improve business results
4.8.2 Assess past and future staffing (e.g., cost benefit analysis, costs-per-hire, selection ratios)
4.8.3 Select alternative that best matches business need
4.8.4 Effectively implement new program/process
4.8.5 Measure effectiveness of new program/process

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.9: Monitor business profitability

Key Indicators:

4.9.1 Follow established criteria to monitor relationship of profitability to the vision for a business
4.9.2 Analyze vision statements for various businesses in terms of future trends
4.9.3 Utilize control practices and procedures for a planned business

BIL: Essential

EDU:	12	AD
	P	

Competency 4.10: Describe crucial components of a quality culture

Key Indicators:

4.10.1 Define quality management
4.10.2 Define continuous improvement of the quality process
4.10.3 Explain reasons businesses focus on quality strategies
4.10.4 Explain importance of continuous improvement to business
4.10.5 Explain strategies that can be implemented that will assist in continuous improvement

BIL: Essential

EDU:	12	AD
	P	

Competency 4.11: Describe the role of management in quality achievement
Key Indicators:
4.11.1 Explain importance of management's commitment to quality achievement
4.11.2 Describe tools that management can use to improve quality
4.11.3 Discuss steps that management can take to develop a plan/program for achievement of quality

BIL: Essential

EDU:	12	AD
	P	

Competency 4.12: Explain the nature of managerial ethics
Key Indicators:
4.12.1 Identify ethical considerations in supervising personnel
4.12.2 Explain impact of unethical treatment of personnel
4.12.3 Explain how managers directly influence the ethical issues within an organization
4.12.4 Describe ethical issues confronting management
4.12.5 Explain how a manager's ethics impacts those of employees
4.12.6 Discuss factors that should be considered in developing a managerial code of ethics
4.12.7 Describe guidelines for treating personnel ethically
4.12.8 Research established professional codes of ethics

Instructional Unit 5: Entrepreneurship

BIL: Essential

EDU:	12	AD
	P	

Competency 5.1: Explore entrepreneurship
Key Indicators:
5.1.1 Identify characteristics of a successful entrepreneur
5.1.2 Describe process of starting a new business
5.1.3 Identify/use available resources for starting a new business
5.1.4 Compare/contrast the rewards and risks of owning a business
5.1.5 Identify the components of a business plan (e.g., description of company, description of service/product)
5.1.6 Differentiate between a manager and an entrepreneur
5.1.7 Identify/appraise the unique contributions of entrepreneurs to the economy of a country
5.1.8 Recognize opportunities resulting from other people's wants and perceived needs
5.1.9 Describe opportunities that lead to the development of successful entrepreneurial endeavors (e.g., a marketable product, new idea, need)
5.1.10 Identify businesses that could be operated from an individual's home or on the Internet
5.1.11 Compare/contrast the advantages and disadvantages of buying an existing business, starting an entirely new business, or purchasing a franchise
5.1.12 Describe feasibility of starting a home-based or Internet-based business
5.1.13 Formulate steps in establishing a business for an entrepreneurial opportunity
5.1.14 Analyze potential business opportunities in relation to personal preferences, financial worthiness, and perceived risk
5.1.15 Explain methods used to determine the financial value of an existing business

BIL: Essential

EDU:	12	AD
	P	

Competency 5.2: Demonstrate an understanding of economic principles
Key Indicators:
5.2.1 Identify economic resources
5.2.2 Compare economic impact of business ventures in various economic systems
5.2.3 Identify economic advancement opportunities in various economic systems
5.2.4 Compare economic responsibilities with economic rights and protections
5.2.5 Analyze impact of cultural differences on consumer choices and behavior
5.2.6 Evaluate short-and long-term alternatives for a business to reach profitability

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.3: Develop financial competence needed by an entrepreneur

Key Indicators:

5.3.1 Determine resources needed to start a business (e.g., materials, knowledge, labor)
5.3.2 Determine cost of starting a planned business (e.g., performance statement)
5.3.3 Identify on-going operational expenses
5.3.4 Project total cash needed to start a business (e.g., start-up costs, ongoing operational expenses, cash reserves)
5.3.5 Assess alternatives for solving cash flow problems
5.3.6 List common sources from which entrepreneurs can borrow money
5.3.7 Identify major sources of funding for a business
5.3.8 Explain advantages and disadvantages of various borrowing sources
5.3.9 Define differences between debt and equity
5.3.10 Describe trade-offs between debt and equity financing
5.3.11 Discuss types of funding within each funding source (e.g., mortgage, short-term loan, and credit line)
5.3.12 Identify components of a loan application
5.3.13 Assess impact of responses to loan application questions on an entrepreneur's chances of receiving a loan
5.3.14 Analyze a profit/loss statement and balance sheet to determine whether a business is profitable
5.3.15 Describe why the analysis of financial statements is important for business
5.3.16 Analyze financial health of a business
5.3.17 Analyze the cash flow of a business
5.3.18 Describe situations in which financial experts should be consulted for the interpretation of financial data
5.3.19 Complete a break-even analysis
5.3.20 Identify factors that cause changes in the financial picture of a business
5.3.21 Explain the impact of a marketing plan on finances

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.4: Determine the options for the organization of a business and its operations

Key Indicators:

5.4.1 Research various entrepreneurial opportunities (e.g., sole proprietorship, partnership, corporation)

5.4.2 Identify different organizational structures available to an entrepreneur
5.4.3 Evaluate a business location
5.4.4 Identify sources of various types of capital
5.4.5 Formulate financial projections necessary for business startup
5.4.6 Adhere to proper legal, tax, and accounting principles
5.4.7 Identify work tasks and develop job descriptions
5.4.8 Develop appropriate risk management strategies
5.4.9 Identify/apply for a legal name

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.5: Develop a business plan
Key Indicators:
5.5.1 Describe why businesses must plan
5.5.2 Identify long-term and short-term planning
5.5.3 Identify major components of a business plan
5.5.4 Describe use of a business plan
5.5.5 Detail information to be included in each component of a business plan
5.5.6 Identify sources of information to be included in the business plan
5.5.7 Critique a business plan for a specific business (e.g., an analysis of the company's use of the Internet and other technologies)
5.5.8 Create/write/develop a business plan for a business
5.5.9 Decide when professional consultants should be used to prepare a business plan
5.5.10 Prepare a timetable for establishing a business
5.5.11 Prepare a proposed plan to be used by the business
5.5.12 Present proposed business plan to stakeholders
5.5.13 Utilize an outside advisory board
5.5.14 Utilize an insurance agent, accountant and attorney for the business

BIL: **Essential**

EDU:	12	AD
	I	P

Competency 5.6: Formulate a marketing strategy for a business
Key Indicators:
5.6.1 Develop a business vision and mission statement
5.6.2 Analyze demographics to create a customer profile
5.6.3 Establish means for building and maintaining customer loyalty
5.6.4 Develop strategies to deal with identified competition

5.6.5 Develop a product strategy (e.g., quality/service, or low price)
5.6.6 Develop a pricing strategy (e.g., quality/service, or low price)
5.6.7 Develop a distribution plan
5.6.8 Develop a promotional campaign
5.6.9 Develop a customer retention plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.7: Analyze financial issues
Key Indicators:
5.7.1 Identify sources of capital (e.g., personal guarantee/guarantor)
5.7.2 Forecast future budgetary needs (e.g., pro forma financial statements)
5.7.3 Prepare a budget
5.7.4 Identify ways companies can control cost
5.7.5 Describe the impact of insurance on financial decisions
5.7.6 Analyze financial statements
5.7.7 Identify the effects of tax on business

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.8: Address changing business environment
Key Indicators:
5.8.1 Research unique contribution of entrepreneurs (e.g., foundations, endowments, employment opportunities, community involvement, economic growth)
5.8.2 Analyze business problems to determine alternative solutions and required change
5.8.3 Identify business trends
5.8.4 Determine the need and foundation of change management
5.8.5 Present proposed changes identified through change management techniques to stakeholders using technology

BIL: Essential

EDU:	12	AD
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Competency 5.9: Illustrate components of productivity

Key Indicators:

5.9.1 Assess human resources needed in a competitive environment
5.9.2 Describe the benefits of an ergonomically sound workplace
5.9.3 Relate the interaction of people and technology
5.9.4 Analyze the effects of technology on productivity (e.g., equipment usage vs. human labor)

Instructional Unit 6: Operations Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.1: Manage purchasing and supply chain
Key Indicators:
6.1.1 Ascertain strategic purchasing agreements
6.1.2 Establish supplier relationships based on performance
6.1.3 Agree on product, supply, cost requirements
6.1.4 Determine acceptability of supplier and product
6.1.5 Establish feedback and review systems
6.1.6 Illustrate why strategic supplier agreements are vital to research and development
6.1.7 Examine requirements for distribution chain (e.g., just-in-time delivery)
6.1.8 Determine key supply measures for the end-user customer
6.1.9 Implement a tracking system to measure suppliers performance (e.g., bar code, manual, electronic)

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.2: Explain the nature and scope of purchasing
Key Indicators:
6.2.1 Identify activities involved in purchasing
6.2.2 Describe importance of purchasing in the operation of a business
6.2.3 Discuss purchasing process to obtain materials, equipment, and supplies used in the operation of the business
6.2.4 Use ethical purchasing methods

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.3: Explain company purchasing policies
Key Indicators:
6.3.1 Explain importance of company purchasing policies
6.3.2 Describe type of company purchasing policies

6.3.3 Explain how purchasing policies enable businesses to obtain the right materials or services in the right quantities at the right time from the right source at the right price (e.g., just-in-time [JIT])
6.3.4 Identify who is responsible for setting purchasing policies

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.4: **Explain the nature of the buying process**
Key Indicators:
6.4.1 Identify steps in the buying process
6.4.2 Explain factors that indicate the need to make a buying decision
6.4.3 Explain importance of the buying process to productivity

BIL: Essential

EDU:	12	AD
	P	

Competency 6.5: **Explain the nature of vendor relationships**
Key Indicators:
6.5.1 Explain importance of good vendor relationships
6.5.2 Describe techniques for maintaining vendor relations

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.6: **Conduct vendor search**
Key Indicators:
6.6.1 Identify sources of vendors
6.6.2 Explain use of technology in conducting vendor search
6.6.3 Describe procedures for conducting vendor searches
6.6.4 Explain reasons for analyzing vendors
6.6.5 Cite reasons a business may want to choose more than one vendor
6.6.6 Use guidelines in choosing vendors

BIL: Essential

EDU:	12	AD
		P

Competency 6.7: Negotiate contracts with vendors

Key Indicators:

6.7.1 Describe factors that should be negotiated with vendors
6.7.2 Identify types of discounts that can be negotiated
6.7.3 Use guidelines in negotiating contracts with vendors
6.7.4 Describe/write RFPs (Request for Price)

BIL: Essential

EDU:	12	AD
	P	

Competency 6.8: Explain the concept of production

Key Indicators:

6.8.1 Define production terms (e.g., production, operation, inputs, and outputs)
6.8.2 Identify inputs used by organizations for production
6.8.3 Distinguish between tangible and intangible outputs
6.8.4 Describe importance of production to an organization
6.8.5 Identify production activities
6.8.6 Describe goals of production activities

BIL: Essential

EDU:	12	AD
		P

Competency 6.9: Plan production

Key Indicators:

6.9.1 Create a master production schedule
6.9.2 Identify factors in having a master production schedule
6.9.3 Calculate effective forecasting
6.9.4 Analyze product lead time
6.9.5 Use query reports for problems
6.9.6 Adjust long-term plan to maintain continuity
6.9.7 Prioritize purchase of long lead-time components
6.9.8 Understand capacity levels so master production schedule does not inadvertently build in critical resource conflicts
6.9.9 Maintain data integrity

BIL: Essential

EDU:	12	AD
		P

Competency 6.10: Establish best practice benchmark measures for operations
Key Indicators:
6.10.1 Understand powerful technique of quality/service costing
6.10.2 Measure the cost impact of nonconformance
6.10.3 Monitor cost of conformance in cost of quality/service measurements
6.10.4 Monitor cost of nonconformance in cost of quality/service measurements
6.10.5 Use quality tools and techniques to identify root causes from the cost of quality/service analysis

BIL: Essential

EDU:	12	AD
		P

Competence 6.11: Integrate product development into the operational process
Key Indicators:
6.11.1 Explain outcome of integration to ensure structure and processes for implementing
6.11.2 State how integrating product development rewrites the traditional rules of product integration
6.11.3 Ensure product introduction checklists are in place
6.11.4 Complete team chart outlining team purpose
6.11.5 Outline the total product from customer's viewpoint

BIL: Essential

EDU:	12	AD
		P

Competency 6.12: Implement new technology for profitability
Key Indicators:
6.12.1 Distinguish between product-based and process-based technology and how each is applied in business environment
6.12.2 Match high quality or low cost of ideas with effective commercial exploitation
6.12.3 Illustrate how technology can be applied to lower operating costs (e.g., welding, materials, packing, manual vs. automation)

BIL: Essential

EDU:	12	AD
		P

Competency 6.13: Disseminate information
Key Indicators:
6.13.1 Share knowledge throughout the organization
6.13.2 Communicate strategic action plan
6.13.3 Monitor progress continuously

BIL: Essential

EDU:	12	AD
		P

Competency 6.14: Apply operations management principles and procedures
Key Indicators:
6.14.1 Identify methods and tools to design or redesign products
6.14.2 Evaluate a product design process
6.14.3 Evaluate effectiveness and efficiency of a production schedule
6.14.4 Identify factors considered with materials procurement
6.14.5 Identify methods of inventory control
6.14.6 Identify inventory control concerns
6.14.7 Evaluate a system for maintaining inventory

BIL: Essential

EDU:	12	AD
		P

Competency 6.15: Analyze job costing
Key Indicators:
6.15.1 Measure actual vs. estimated costs
6.15.2 Identify cost of a job
6.15.3 Interpret outcome of job costing
6.15.4 Establish target costs
6.15.5 Identify interaction between operations and accounting

Instructional Unit 7: Human Resource Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.1: Apply basic human resource management concepts

Key Indicators:

7.1.1 Apply knowledge of various human resource management models
7.1.2 Recognize factors that may affect human resource management within an organization

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.2: Perform workforce staffing functions

Key Indicators:

7.2.1 Analyze human resource (HR) staffing processes
7.2.2 Apply knowledge of talent acquisition activities for staffing issues
7.2.3 Evaluate hiring criteria
7.2.4 Demonstrate procedures for recruiting new/existing employees
7.2.5 Demonstrate interviewing skills
7.2.6 Select new/existing talent
7.2.7 Perform post-offer employment activities
7.2.8 Orient new employees

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.3: Serve as a resource for employees

Key Indicators:

7.3.1 Determine management's/human resources' roles in maintaining labor relations
7.3.2 Explain the role of labor and management
7.3.3 Research personnel policies
7.3.4 Research appropriate dispute resolution and disciplinary policies and procedures
7.3.5 Evaluate strategies for building cooperative employer-employee relations

BIL: Essential

EDU:	12	AD
	P	R

Competency 7.4: Manage employees

Key Indicators:

7.4.1 Develop team building
7.4.2 Plan/organize the work efforts of others
7.4.3 Schedule employees
7.4.4 Delegate responsibility for job tasks
7.4.5 Establish standards for job performance
7.4.6 Conduct performance management activities

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.5: Administer compensation and benefits programs

Key Indicators:

7.5.1 Coordinate compensations and benefits systems and the relation to human resource management goals
7.5.2 Analyze compensation functions
7.5.3 Analyze benefits function
7.5.4 Identify the impact of employee classifications on compensation and benefits
7.5.5 Analyze compensation and benefits tasks that support and enhance the strategic management of a business

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.6: Administer an employee development program

Key Indicators:

7.6.1 Explain human resource development practices
7.6.2 Apply knowledge of employee development that helps organizations maximize results through human resources
7.6.3 Research an employee development program
7.6.4 Design an employee development program
7.6.5 Implement an employee development program
7.6.6 Evaluate an employee development program

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.7: Administer programs that encourage employee safety and wellness

Key Indicators:

7.7.1 Analyze ongoing evaluation of programs, practices, and services to promote the physical and mental well being of individuals in the workplace and to protect individuals and the workplace from unsafe acts, unsafe working conditions, and violence

7.7.2 Identify health and security activities

7.7.3 Explain routine company security precautions

7.7.4 Research the development of employee assistance programs

7.7.5 Identify employee fitness and wellness programs

BIL: Essential

EDU:	12	AD
	P	R

Competency 7.8: Use appropriate release techniques for organizational exit

Key Indicators:

7.8.1 Determine the strategic importance of organizational exit

7.8.2 Demonstrate knowledge of staff using employment-at-will

7.8.3 Demonstrate knowledge of releasing staff due to layoffs

7.8.4 Demonstrate knowledge of terminating staff for cause

7.8.5 Release staff due to retirement

7.8.6 Describe employee exit activities

7.8.7 Identify procedures for dismissing or firing employees

Instructional Unit 8: Quality Assurance

BIL: Essential

EDU:	12	AD
		P

Competency 8.1: **Explain quality assurance**

Key Indicators:

8.1.1 Summarize the historical evolution of quality assurance/total quality management (e.g., Deming Theory, ISO 9000, 9001 [International Organization for Standards], quality assurance, continuous improvement)
8.1.2 Translate the changes brought about by global quality leaders
8.1.3 Discuss standards/requirements for various quality systems (e.g., Baldridge, ISO 9001)
8.1.4 Explain quality management terminology
8.1.5 Identify role of quality within an organization
8.1.6 Identify features and benefits of quality planning
8.1.7 Describe control devices used in functional areas
8.1.8 Describe relationship among organizational structures, policies, procedures, and quality assurance
8.1.9 Identify internal and external customers
8.1.10 Discuss successful efforts by industry to improve quality and/or reduce costs
8.1.11 Differentiate between prevention and detection
8.1.12 Differentiate between variable and attribute data
8.1.13 Identify types of control charts
8.1.14 Explain how statistical techniques are used to control quality (e.g., Six-Sigma)

BIL: Essential

EDU:	12	AD
		P

Competency 8.2: **Employ quality tools**

Key Indicators:

8.2.1 Describe characteristics and functions of quality tools
8.2.2 Select quality tools appropriate to situation
8.2.3 Illustrate affinity diagrams
8.2.4 Design attributes control charts
8.2.5 Illustrate cause-and-effect diagrams
8.2.6 Design check sheets
8.2.7 Prepare flowcharts
8.2.8 Illustrate Histograms
8.2.9 Illustrate Pareto diagrams
8.2.10 Prepare relations diagrams

8.2.11 Prepare run charts
8.2.12 Design scatter diagrams
8.2.13 Design systematic diagrams
8.2.14 Prepare variables control charts
8.2.15 Interpret charts
8.2.16 Write operational definitions
8.2.17 Perform force-field analyses
8.2.18 Employ Nominal Group Techniques
8.2.19 Conduct sampling (e.g., critical path method (CPM), program evaluation and review techniques (PERT), process mapping, Gant Charts)

BIL: Essential

EDU:	12	AD
		P

Competency 8.3: **Examine quality cost implications**
Key Indicators:
8.3.1 Establish cost/quality objectives
8.3.2 Classify costs (e.g., direct and indirect, fixed and variable, methods and standards)
8.3.3 Classify quality costs (e.g., prevention, evaluation, pre-delivery failure, post-delivery failure)
8.3.4 Interpret quality cost reports
8.3.5 Establish guidelines for liability prevention
8.3.6 Identify safety terms of product
8.3.7 Identify safety responsibility within organization
8.3.8 Differentiate between expressed and implied warranty
8.3.9 Differentiate between warranty and product liability
8.3.10 Describe the role of warranties in contract law

BIL: Essential

EDU:	12	AD
		P

Competency 8.4: **Produce a quality product that is consistent with a company's goals and objectives**
Key Indicators:
8.4.1 Design product (e.g., using brainstorming, thumbnail sketches)
8.4.2 Consider customer satisfaction in determining product characteristics (e.g., usefulness, price, operation, life, reliability, cost of operation)
8.4.3 Determine reliability factors (e.g., cost, human, productability)

8.4.4 Achieve reliability through maintainability, good design, design simplification, and design redundancy
8.4.5 Recognize relationship of maintainability and reliability
8.4.6 Test products for reliability
8.4.7 Align cost components with quality objectives
8.4.8 Classify quality costs (e.g., preventive evaluation, pre-delivery and post-delivery failures)
8.4.9 Initiate predictive maintenance procedures

BIL: Essential

EDU:	12	AD
		P

Competency 8.5: **Develop interdepartmental relationships to support quality assurance that is consistent with a company's goals and objectives**

Key Indicators:
8.5.1 Recognize need for total commitment to assuring quality
8.5.2 Select quality improvement model
8.5.3 Establish project selection criteria
8.5.4 Determine project implementation cycle
8.5.5 Determine project evaluation procedures
8.5.6 Maintain continuous improvement
8.5.7 Investigate trends in experiment design
8.5.8 Investigate trends in predictive maintenance

Instructional Unit 9: Process and Project Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.1: **Initiate a project**
Key Indicators:
9.1.1 Determine economic feasibility
9.1.2 Determine project goals
9.1.3 Determine deliverables
9.1.4 Determine process outputs
9.1.5 Document constraints
9.1.6 Document assumptions
9.1.7 Determine strategy
9.1.8 Identify performance criteria
9.1.9 Determine resource requirements
9.1.10 Set budget
9.1.11 Produce formal documentation

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.2: **Plan a project**
Key Indicators:
9.2.1 Refine project
9.2.2 Create Work Breakdown Structure (WBS)
9.2.3 Use a work breakdown structure to scope out a project
9.2.4 Develop resource management plan
9.2.5 Refine time and cost estimates
9.2.6 Establish project controls
9.2.7 Develop project plan
9.2.8 Obtain plan approval
9.2.9 Establish user acceptance of plan/pilot

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.3: **Execute project**

Key Indicators

9.3.1 Allocate resources effectively using resource lading and leveling charts
9.3.2 Commit resources
9.3.3 Implement resources
9.3.4 Use project management software
9.3.5 Manage progress
9.3.6 Communicate progress

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.4: **Control project**

Key Indicators:

9.4.1 Measure performance
9.4.2 Refine control limits
9.4.3 Take corrective action
9.4.4 Evaluate effectiveness of corrective action
9.4.5 Ensure plan compliance
9.4.6 Reassess control plans
9.4.7 Respond to risk event triggers
9.4.8 Monitor project activity

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.5: **Exhibit professional behavior as a project manager**

Key Indicators:

9.5.1 Ensure integrity
9.5.2 Contribute to knowledge base
9.5.3 Apply professional knowledge
9.5.4 Balance stakeholder interests
9.5.5 Respect differences

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.6: Coordinate a project, using quality tools, to achieve required balance of time, cost, quality (e.g., project planning, execution, change control)

Key Indicators:

9.6.1 Select a project to fit business and organizational needs
9.6.2 Create a project plan that takes into account all aspects of the project
9.6.3 Develop a written statement outlining the scope, extent and limits of the project
9.6.4 Define a baseline plan for the project's scope, time, and cost plan
9.6.5 Develop a project chart to serve as a proposal or contract document which can be used to get project approval
9.6.6 Determine the type and quantity of resources needed to complete project activities (e.g., people, equipment, software)
9.6.7 Execute the activities in the project plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.7: Manage a project

Key Indicators:

9.7.1 Manage/coordinate business, organizational, technological, and resource changes that affect an entire project
9.7.2 Redefine the scope, time, and cost plan for a project when one factor must be traded off against the other
9.7.3 Determine when project scope is too large and subdivide major components into smaller, more manageable projects
9.7.4 Determine usefulness of project management software tools
9.7.5 Use project management software tools to plan and control a project
9.7.6 Monitor project scope progress against the plan
9.7.7 Shut down the project at appropriate review points if problems are identified
9.7.8 Conclude the project when all requirements are achieved
9.7.9 Implement quality assurance procedures

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.8: **Manage costs**

Key Indicators:

9.8.1 Prepare an annual baseline plan budget, broken down by time period, task and cost account

9.8.2 Determine what type and quantity of resources are needed to complete the project (e.g., people, equipment)

9.8.3 Develop an estimate of the cost of each task

9.8.4 Use tools to control the budget and expenses (e.g., project management systems, spreadsheets, manual and automated financial systems)

9.8.5 Use statistical tools to calculate the probabilities of meeting the project costs

9.8.6 Devise risk management methods to handle variances

9.8.7 Control changes to the project budget

9.8.8 Control scope changes that affect the budget

9.8.9 Revise the budget as necessary

9.8.10 Use cost performance reporting tools to control project expenditures (e.g., earned value, Cost Performance Management Systems [C/SPMS])

9.8.11 Determine which tasks are on or off the baseline budget and whether cash flows are affected

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.9: **Manage quality**

Key Indicators:

9.9.1 Determine which quality control standards are relevant to the project (e.g., ISO 9000, ISO10000)

9.9.2 Develop a quality management plan that quantifies and coordinates the activities; that assesses the effectiveness, efficiency, and quality of the system

9.9.3 Conduct quality assurance activities regularly to ensure that the project will satisfy the quality standards

9.9.4 Prevent defects by monitoring specific project results to determine if they comply with relevant quality control standards

9.9.5 Manage the technical quality of the system by using walkthroughs, reviews, testing, defect removal, and independent validation and verification

9.9.6 Act on negative results detected during quality control activities

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.10: Distribute quality project information

Key Indicators:

9.10.1 Determine the information and communication needs of stakeholders (e.g., what information, when it is needed, how and to whom it should be provided)
9.10.2 Develop a communications plan
9.10.3 Decide how the information will be gathered and stored
9.10.4 Make necessary information available to project stakeholders in a concise and timely fashion (e.g., using verbal, textual, and graphical reporting tools)
9.10.5 Manage client and stakeholder relationships (e.g., to ensure commitment and involvement, and to encourage effective collaboration)
9.10.6 Report on the progress of project schedule, cost, and scope
9.10.7 Compare present status to the baseline to forecast future trends, using earned value analysis
9.10.8 Warn stakeholders if changes will affect them
9.10.9 Generate/gather/disseminate information to formalize phase and project completion
9.10.10 Conduct a post-project audit to ensure that the actuals, risks, general findings, and 'lessons learned' are documented and disseminated to support a continuous learning culture

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.11: Control risk

Key Indicators:

9.11.1 Write a risk management plan to document the process, activities, milestones and responsibilities
9.11.2 Assign resources for managing risk
9.11.3 Identify internal risks (e.g., those under the control of the project: technology use, staff hired)
9.11.4 Identify external risks (e.g., those not under the control of the project: economy, political climate, other projects)
9.11.5 Evaluate risk interactions to assess the range of possible project outcomes
9.11.6 Use risk-management charts, spreadsheets, and other tools to evaluate and prioritize risks
9.11.7 Plan how to eliminate or mitigate risks by assigning responsibility to develop contingency plans

9.11.8 Use statistical methods to develop a project cost and time estimate range quantified by risk probability and confidence level
9.11.9 Communicate risks and possible results to stakeholders
9.11.10 Monitor risk warnings and events
9.11.11 Track risks
9.11.12 Change the risk items over the course of the project according to the risk management plan
9.11.13 Document actual risk events
9.11.14 Feed risk events information into the risk database and subsequent risk management

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.12: Perform project procurement management to ensure quality service or product acquisition

Key Indicators:

9.12.1 Use project plan and input from the procurement authorities to develop a procurement strategy (e.g., details what to procure, how to procure it, types of contract, when to prevent it and at what cost)
9.12.2 Develop agreements with external vendors and contractors
9.12.3 Identify internal and external organizational processes needed to acquire goods and services through contracts
9.12.4 Prepare procurement support documentation (e.g., specifications, statement of work, request for information request for proposal, evaluation criteria, vendor lists)
9.12.5 Obtain proposals
9.12.6 Select a proposal by systematically applying evaluation criteria and researching supplier background information
9.12.7 Establish the contract to ensure all contractual parties satisfy the terms and conditions of the contract
9.12.8 Approve any subcontracts entered into by the contractor
9.12.9 Control changes and amendments to the contract if changes are required
9.12.10 Manage vendor relationships to ensure open communication and to resolve problems
9.12.11 Monitor contractor's performance in relation to cost; schedule, scope, and quality by applying appropriate quality management processes (e.g., validation, verification, acceptance)
9.12.12 Ensure prompt payments as per the agreement based on deliverables, milestones, time or other accomplishments

BIL: Essential

EDU:	12	AD
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Competency 9.13: Close project
Key Indicators:
9.13.1 Obtain acceptance of deliverables
9.13.2 Document lessons learned
9.13.3 Facilitate closure
9.13.4 Preserve product records and tools
9.13.5 Release resources

Instructional Unit 10: Financial Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.1: Apply accounting principles
Key Indicators:
10.1.1 Define accounting terminology
10.1.2 Identify accounting principles and applications
10.1.3 Identify computer accounting applications
10.1.4 Identify common financial control procedures
10.1.5 Interpret cash flow statements
10.1.6 Interpret balance sheets
10.1.7 Interpret income statements

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.2: Describe the impact of finances on various departments
Key Indicators:
10.2.1 Discuss how profit/loss affects each department
10.2.2 Interpret a typical operating budget
10.2.3 Investigate budget controls
10.2.4 Describe financial trends that affect policy/procedures (e.g., legislative, economic)

Instructional Unit 11: Business Law and Legal Issues

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.1: Describe legal issues affecting businesses
Key Indicators:

11.1.1 Describe the purpose of major types of laws that affect businesses (e.g., contract law, sales law, property law, intellectual property and computer law, bankruptcy law, tax law)
11.1.2 Explain reasons that businesses are regulated
11.1.3 Differentiate between crimes and torts (e.g., terminology, conceptual development)
11.1.4 Differentiate between criminal and civil law
11.1.5 Differentiate between state and federal court systems
11.1.6 Illustrate court system procedural process
11.1.7 Determine practical implications of lawsuits in terms of goodwill, client relations, the bottom line, diversion of company resources, cash flow, and accounts receivable
11.1.8 Discuss basic business law concepts
11.1.9 Relate current laws and regulations to company contracts, policies, and procedures
11.1.10 Demonstrate knowledge of legal terminology
11.1.11 Establish procedures for maintaining the confidentiality of client information

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.2: Explain the nature of personnel regulations
Key Indicators:

11.2.1 Describe intent of the Civil Rights Act of 1964
11.2.2 Explain purpose of the Equal Employment Opportunity Act of 1972
11.2.3 Explain impact of personnel regulations on businesses
11.2.4 Describe nature of regulations that affect hiring decisions
11.2.5 Describe nature of regulations that affect promotion decisions
11.2.6 Explain nature of regulations on employee dismissal
11.2.7 Describe nature of legislation that affects employees' wages and salaries

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.3: Discuss labor laws

Key Indicators:

11.3.1 Describe the employment-at-will concept
11.3.2 Describe key laws related to employment discrimination
11.3.3 Describe key agencies related to employment discrimination
11.3.4 Describe key concepts related to employment discrimination
11.3.5 Describe the concept of reasonable accommodation
11.3.6 Identify the key characteristics of Social Security and other retirement systems
11.3.7 Identify the rights and responsibilities of parties to an employment contract
11.3.8 Identify state and federal laws dealing with employment
11.3.9 Identify protection available to employees
11.3.10 Identify rules of law affecting minors
11.3.11 Describe basic laws relating to working conditions, wages and hours, civil rights, social security, disability, and unemployment
11.3.12 Discuss the legal issues of union vs. business

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.4: Explain/monitor the nature of workplace regulations (e.g., Occupational Safety and Health Administration [OSHA], Americans with Disabilities Act [ADA])

Key Indicators:

11.4.1 Describe OSHA, ADA, Bureau of Employment Services, and workers compensation
11.4.2 Identify regulations that affect workplace safety and access
11.4.3 Describe impact of workplace regulations on business
11.4.4 Describe Family Medical Leave Act (FMLA)
11.4.5 Describe available drug and alcohol programs (e.g., screening of personnel)
11.4.6 Explain use of criminal background checks (e.g., types, methods)
11.4.7 Explain bonding requirements used by companies
11.4.8 Explain prevailing wage laws
11.4.9 Follow workplace regulations

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.5: **Explain/monitor environmental regulations**
Key Indicators:
11.5.1 Describe need for environmental regulations
11.5.2 Describe environmental regulations that affect businesses
11.5.3 Discuss impact of environmental regulations on business
11.5.4 Explain how government agencies enforce environmental regulations (e.g., state and federal Environmental Protection Agency [EPA], Army Corp of Engineers)
11.5.5 Follow environmental regulations

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.6: **Explain/monitor tax regulations affecting businesses**
Key Indicators:
11.6.1 Describe income taxes, property taxes, transaction taxes and employment taxes (e.g., local, state, federal, workers' compensation)
11.6.2 Describe impact of taxes on businesses (e.g., reporting requirements)
11.6.3 Identify items on which businesses are taxed
11.6.4 Identify available tax incentives
11.6.5 Follow tax regulations

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.7: **Explain/monitor businesses' reporting requirements**
Key Indicators:
11.7.1 Explain reasons businesses are required to report information
11.7.2 Discuss what businesses are required to report (e.g., sales tax receipts, employee's taxable total wages, Social Security, Medicare, unemployment taxes, workers compensation, new hire's proof of citizenship)
11.7.3 Describe penalties faced by businesses for failing to file reports
11.7.4 Write reports as required

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.8: Describe legally binding contracts

Key Indicators:

11.8.1 Describe key characteristics of contracts and/or legal documents
11.8.2 Explain elements of a valid contract
11.8.3 Differentiate between types of contracts
11.8.4 Differentiate between transferable and nontransferable contracts
11.8.5 Define contract terms (e.g., contract, capacity, consideration, forbearance, express contracts, implied contracts, quasi-contracts, breach of contract)
11.8.6 Identify the conditions needed to make a contract legally binding
11.8.7 Describe situations in which businesses need legally binding contracts
11.8.8 Explain the importance of legally binding contracts in business
11.8.9 Explain the need for consideration when setting up contracts
11.8.10 Classify the types of contracts
11.8.11 Describe situations in which a contract may be discharged
11.8.12 Explain remedies for breach of contract

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.9: Explain intellectual property rights covered by intellectual law

Key Indicators:

11.9.1 Describe various forms of intellectual property rights
11.9.2 Define fair use
11.9.3 Define authorship
11.9.4 Define plagiarism
11.9.5 Examine court cases related to intellectual property rights
11.9.6 Explain the First Amendment rights
11.9.7 Give examples of software licensing issues
11.9.8 Explain how to obtain a copyright
11.9.9 Explain how to obtain a patent
11.9.10 Explain how to obtain a trademark
11.9.11 Identify perils in acquiring content rights
11.9.12 Identify rights granted under copyright, patent, and trademark
11.9.13 Identify rights related to electronic imagery
11.9.14 Identify liability for copyright infringement
11.9.15 Identify liability for invasion of privacy
11.9.16 Identify liability for slander and libel

11.9.17 Describe confidentiality issues and their liability implications
11.9.18 Explain the characteristics of warranties

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.10: Explain the nature of trade regulations
Key Indicators:
11.10.1 Describe Uniform Commercial Code (UCC) transfer of ownership
11.10.2 Compare how the law treats merchants verses individuals
11.10.3 Discuss reasons that merchants can transfer ownership
11.10.4 Explain when the transfer of ownership and risk of loss occur in trade transactions
11.10.5 Distinguish between fair and unfair trade practices

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.11: Explain commercial real estate law
Key Indicators:
11.11.1 Identify various documents relating to the sale of commercial property
11.11.2 Explain a commercial real estate settlement
11.11.3 Describe title insurance and financing documents

BIL: Essential

EDU:	12	AD
	I	P

Competency 11.12: Evaluate the use of legal action
Key Indicators:
11.12.1 Describe situations requiring professional legal assistance
11.12.2 Evaluate cost of litigation vs. settlement
11.12.3 Evaluate cost of publicity as a result of litigation
11.12.4 Evaluate available legal services
11.12.5 Contrast civil vs. criminal charges

Instructional Unit 12: Risk Management

BIL: Essential

EDU:	12	AD
	P	

Competency 12.1: Explain types of business risk
Key Indicators:
12.1.1 Identify types of business risks
12.1.2 Explain how risk affects business
12.1.3 Describe nature of risk (e.g., pure risk, speculative risk)
12.1.4 Identify examples of pure risks and speculative risk

BIL: Essential

EDU:	12	AD
	P	

Competency 12.2: Identify speculative business risks
Key Indicators:
12.2.1 Explain why businesses should evaluate speculative risks
12.2.2 Explain costs/benefits of speculative business risks
12.2.3 Describe guidelines for evaluating speculative business risks

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.3: Demonstrate knowledge of risk management
Key Indicators:
12.3.1 Examine concepts of risk and probability
12.3.2 Describe historical development of insurance
12.3.3 Explain how risk is determined
12.3.4 Analyze risk management techniques

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.4: Manage risk

Key Indicators:

12.4.1 Describe risk faced by business owners
12.4.2 Explain ways business owners can protect themselves from risk
12.4.3 Describe ways that risk can be reduced through careful planning
12.4.4 Explain role of management in reducing business risk
12.4.5 Identify types of business insurance
12.4.6 Identify types of insurance needed for a business
12.4.7 Explain principles of a sound risk management program
12.4.8 Evaluate appropriate levels of insurance for a business

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.5: Perform credit risk management

Key Indicators:

12.5.1 Compare/contrast credit exposure and credit risk
12.5.2 Compare/contrast counter-party exposure and counter-party risk
12.5.3 Compare/contrast default probability and recovery rate
12.5.4 Describe credit rating migration
12.5.5 Compare/contrast margin and collateral requirements
12.5.6 Compare/contrast pre-settlement vs. settlement risk
12.5.7 Describe counter-party risk
12.5.8 Compare/contrast measuring and managing credit risk
12.5.9 Describe credit derivatives
12.5.10 Complete counter-party agreements

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.6: Follow operational and integrated risk management procedures

Key Indicators:

12.6.1 Explain policies and procedure
12.6.2 Identify best practices

12.6.3 Explain business structure
12.6.4 Describe firm-wide risk management
12.6.5 Calculate risk capital
12.6.6 Describe risk model

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.7: Describe legal, accounting, and task-risk management
Key Indicators:
12.7.1 Describe legal risk
12.7.2 Describe accounting risk
12.7.3 Describe task risk

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.8: Explain regulation and compliance
Key Indicators:
12.8.1 Describe BIS Capital Accord (1988)
12.8.2 Describe the New Base Capital Accord (2001)
12.8.3 Describe BIS Market Risk Amendment (1996)
12.8.4 Describe EU Capital Adequacy Directive
12.8.5 Describe FAS 133

Instructional Unit 13: International Business

BIL: Essential

EDU:	12	AD
	P	

Competency 13.1: **Identify forms of business ownership and entrepreneurial opportunities available in international business**

Key Indicators:

13.1.1 Identify types of ownership of selected businesses involved in international trade

13.1.2 Suggest an appropriate form of business ownership for different international business situations (e.g., sole proprietorship, partnership, corporation)

13.1.3 Determine social and cultural influences on the form of business ownership used or required in different countries

13.1.4 Identify risks and rewards related to doing business in a foreign market

13.1.5 Identify organizations, government agencies, and other resources that a business might use to investigate international trade opportunities

13.1.6 Debate the advantages and disadvantages of expansion into international trade activities

13.1.7 Compare the business plan of a domestic company with those of an international company

13.1.8 Develop a business plan for a company to expand to a foreign market

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.2: **Manage involvement in international business**

Key Indicators:

13.2.1 Describe situations appropriate for indirect and direct exporting

13.2.2 Distinguish between licensing and franchising for international business activities

13.2.3 Describe internal and external factors that influence a company's international expansion

13.2.4 Create examples of joint ventures and strategic alliances for internal business activities

13.2.5 Explain how management contracting may be used by a company doing business internationally

13.2.6 Describe different organizational structures that a company might use in international environments

13.2.7 Evaluate the use of foreign direct investments (e.g., wholly owned subsidiary for international business activities)

13.2.8 Analyze a company's resources to determine its potential for becoming a global company

BIL: Essential

EDU:	12	AD
	P	

Competency 13.3: Identify international business success

Key Indicators:

13.3.1 Identify financial, economic, and social benefits and cost of international business activities

13.3.2 Describe the potential economic and social contributions of global business decisions

13.3.3 Assess quantitative and qualitative contributions of a company's actions to consumers, workers, the economy, and the society of a country

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.4: Relate balance of trade concepts to the import/export process

Key Indicators:

13.4.1 List examples of importing and exporting

13.4.2 Discuss the differences between exporting goods and exporting a service

13.4.3 Identify goods and services imported to and/or exported from a state, region, and country

13.4.4 Identify circumstances under which countries trade with each other

13.4.5 List the steps in the importing and exporting process

13.4.6 Identify the risks associated with importing and exporting

13.4.7 Identify information and sources of financial assistance for facilitating the import/export process

13.4.8 Explain how a company that exports has a different level of commitment to the international environment than does a company with global operations in several countries

13.4.9 Compare the benefits and costs of indirect and direct exporting

13.4.10 Identify documents commonly used in the importing and exporting process

13.4.11 Analyze the import or export potential for a goods or service and the ability of the company to carry out the role

13.4.12 Describe the role of state and federal agencies and other agencies and organizations that provide exporting information and assistance

13.4.13 Explain how historical events have contributed to the formation of strategic trade alliances

13.4.14 Discuss why governments impose trade barriers (e.g., quotas, tariffs, licensing requirements, exchange rate controls)
13.4.15 Describe international trade agreements and organizations (e.g., WTO [World Trade Organization], EU [European Union], NAFTA [North American Free Trade Agreement], MERCOSUR [Mercado Comun del Cono Sur – Southern Core Market])

BIL: Essential

EDU:	12	AD
		P

Competency 13.5: **Analyze special challenges in operations and human resource management in international business**

Key Indicators:

13.5.1 Identify how the management functions of planning, organizing, influencing, and controlling are affected in international operations and production
13.5.2 Describe the production processes used to create goods and services in different countries
13.5.3 Define standards as they apply to international business
13.5.4 Describe the role and purpose of the International Organization for Standards (ISO)
13.5.5 Identify environmental factors that influence the use of particular organizational structure for a global business operation (e.g., functional, product, geographic, matrix)
13.5.6 Describe uses of centralized and decentralized organizational structures
13.5.7 Describe how quality measures and management relate to the efficiency and effectiveness of an organization's international business operations
13.5.8 Discuss the effect of economic and cultural factors on the use of manual, automated, and computerized production systems
13.5.9 Explain quality standards as they relate to international commerce
13.5.10 Discuss importance of multi-languages in communication and procedures

Instructional Unit 14: Intelligence Management

Definition: Learn to use basic data tools to make informed management decisions. Includes probability, decision analysis, basic statistics, regression, simulation, and linear/nonlinear optimization. Includes marketing, finance, operations management, and other management functions.

BIL: Essential

EDU:	12	AD
	P	

Competency 14.1: **Use effective communication skills for intelligence management**

Key Indicators:

14.1.1 Define intelligence management
14.1.2 Transform ideas into words and actions
14.1.3 Listen and ask questions
14.1.4 Foster credibility among colleagues, peers, and subordinates
14.1.5 Develop written and graphic presentations to promote ideas

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.2: **Utilize intelligence management**

Key Indicators:

14.2.1 Identify basic tools and techniques of intelligence management
14.2.2 Use information to solve business problems
14.2.3 Identify opportunities for innovation
14.2.4 Recognize problem areas and implement solutions
14.2.5 Select critical information from masses of data
14.2.6 Use technology in intelligence management
14.2.7 Explain the organizations business model

BIL: Essential

EDU:	12	AD
		P

Competency 14.3: **Apply intelligence management skills within an organization**

Key Indicators:

14.3.1 Contribute to corporate mission/departmental objectives
14.3.2 Develop a customer focus approach

14.3.3 Develop multi-tasking skills
14.3.4 Develop negotiation skills
14.3.5 Review/implement improvements
14.3.6 Set/maintain performance standards (e.g., self and subordinate activities, vendors suppliers, business partners)
14.3.7 Set priorities for attention and activity
14.3.8 Manage time for efficiency

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.4: Develop interpersonal skills needed in intelligence management
Key Indicators:
14.4.1 Utilize coaching and mentoring skills
14.4.2 Work with diverse people and cultures
14.4.3 Network within the organization
14.4.4 Work in teams
14.4.5 Develop a sense of cooperation and commitment

Instructional Unit 15: Data Mining

Definition: Data mining methods assists managers in recognizing patterns and making intelligent use of massive amounts of electronic data collected via the Internet, e-commerce, electronic banking, point-of-sale devices, barcode readers, and intelligent machines. Includes regression, collaborative filtering, tree-structured classification and regression, cluster analysis and neural network methods. Application includes credit ratings, fraud detection, database marketing, customer relationship management, and investments and logistics.

BIL: Essential

EDU:	12	AD
	P	

Competency 15.1: Explain data mining
Key Indicators:
15.1.1 Define data mining
15.1.2 Identify basic tools and techniques of data mining
15.1.3 Explain the use of data mining in Customer Relationship Management (CRM)
15.1.4 Identify/select key data needed to measure performance

BIL: Essential

EDU:	12	AD
	P	

Competency 15.2: Apply ethical behaviors to data mining
Key Indicators:
15.2.1 Define appropriate security measures
15.2.2 Explain limitations of data mining
15.2.3 Define use of permanent detail data for legal or ethical purposes

BIL: Essential

EDU:	12	AD
	I	P

Competency 15.3: Use basic data mining techniques in making management decisions
Key Indicators:
15.3.1 Identify sources of management information accessible through data mining
15.3.2 Select appropriate data
15.3.3 Analyze management data (e.g., promotion, site personalization, product mix)

Instructional Unit 16: Knowledge-Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 16.1: Explore knowledge-management (KM)
Key Indicators:

16.1.1 Define knowledge-management
16.1.2 Provide summary of origins of knowledge-management
16.1.3 Explain why knowledge is considered one of the most important assets for organizations
16.1.4 Determine difference between explicit and tacit knowledge and why distinction is important in knowledge-management
16.1.5 Identify drivers for organizations to effectively manage knowledge
16.1.6 State reasons to implement knowledge-management
16.1.7 Recognize barriers to knowledge-management
16.1.8 Examine financial potential of knowledge-management for businesses

BIL: Recommended

EDU:	12	AD
		I

Competency 16.2: Analyze elements in knowledge-management framework
Key Indicators:

16.2.1 Explain role of knowledge workers and the relationship to knowledge-management
16.2.2 Identify intangible assets of knowledge-management framework (e.g., employee competence, internal structure, external structure)
16.2.3 Explain purpose of the knowledge spiral
16.2.4 Examine core concepts of learning organization
16.2.5 Map how value is created through a value network

BIL: Recommended

EDU:	12	AD
		I

Competency 16.3: Analyze functions and roles of chief knowledge officer

Key Indicators

16.3.1 Determine why business needs a chief knowledge officer (CKO)
16.3.2 State advantages and disadvantages of internal and external hire of chief knowledge officer
16.3.3 Define various roles of chief knowledge officer in business
16.3.4 Examine importance of chief knowledge officer relationship with organization's information technology division
16.3.5 Critique various chief knowledge officer locations within organizational function areas (e.g., human relations, information technology, stand-alone)

BIL: Recommended

EDU:	12	AD
		I

Competency 16.4: Evaluate knowledge-management implementation programs

Key Indicators:

16.4.1 Research knowledge-management best practices currently implemented in companies
16.4.2 Formulate vision and strategies for knowledge-management program
16.4.3 Investigate critical success factors for knowledge-management efforts
16.4.4 Determine measures of success for knowledge-management program
16.4.5 Create key knowledge processes in building knowledge-management foundation (e.g., learning communities, project snapshots, knowledge mapping)
16.4.6 Examine components in designing a knowledge-based system (e.g., measures, new roles, enabling technology)

BIL: Recommended

EDU:	12	AD
		I

Competency 16.5: Develop knowledge-management strategies

Key Indicators:

16.5.1 Illustrate fundamental elements of knowledge-management strategies
16.5.2 Align knowledge-management strategy with corporate strategies
16.5.3 Identify the critical success factor of an executive sponsor
16.5.4 Define what knowledge-management means within organization

16.5.5 Choose scope of strategies (e.g., entire organization or multiple projects)
16.5.6 Choose knowledge-management concentration (e.g., tacit knowledge, explicit knowledge)

BIL: Recommended

EDU:	12	AD
		I

Competency 16.6: **Develop knowledge-management prototype**
Key Indicators:
16.6.1 Determine benefits of knowledge-management pilot project
16.6.2 Build a prototype
16.6.3 Determine steps for successful pilot
16.6.4 Involve management and end users
16.6.5 Master team dynamics (e.g., diversity, skills)

BIL: Recommended

EDU:	12	AD
		I

Competency 16.7: **Build knowledge-management infrastructure**
Key Indicators:
16.7.1 Determine how knowledge-management is integrated in decentralized and centralized organizational structures
16.7.2 Examine importance of proposing multiple levels of investment with varying levels of return
16.7.3 Create new organizational tools within core knowledge-management group and throughout an organization
16.7.4 Determine roles to support knowledge processes (e.g., knowledge steward, knowledge researchers, knowledge brokers)
16.7.5 Form steering committee with representatives from various departments in a business

BIL: Recommended

EDU:	12	AD
		I

Competency 16.8: Evaluate communities of practice as organizational structure

Key Indicators:

16.8.1 Describe characteristics of community of practice as organizational structure
16.8.2 Classify dimensions of community of practice
16.8.3 Construct life cycle of community of practice
16.8.4 Summarize importance of community coordinator as critical success factor to community of practice

BIL: Recommended

EDU:	12	AD
		I

Competency 16.9: Evaluate people-to-people approaches used in knowledge-management

Key Indicators:

16.9.1 Explain use and limitations of corporate yellow pages as expertise locator
16.9.2 Determine use and limitations of technology packages as expertise locator
16.9.3 Illustrate effectiveness of best practice systems as expertise locator
16.9.4 Determine advantages of using multiple approaches in connecting people

BIL: Recommended

EDU:	12	AD
		I

Competency 16.10: Analyze importance of capture and transfer of strategic knowledge

Key Indicators:

16.10.1 Identify factors that lead to loss of organizational knowledge
16.10.2 Identify ways of preventing loss of knowledge
16.10.3 Identify what knowledge is being lost in an organization
16.10.4 Determine the consequences of knowledge loss
16.10.5 Find solutions for controlling knowledge loss
16.10.6 Choose various approaches in transferring strategic knowledge

Knowledge-Management and Technology

BIL: Recommended

EDU:	12	AD
		I

Competency 16.11: Implement knowledge-management using technology
Key Indicators:
16.11.1 Implement knowledge-management by partnering with organization's technology department
16.11.2 Show value of technology for the needs of business
16.11.3 Determine potential differences in design of global technology system and the importance when implementing knowledge

BIL: Recommended

EDU:	12	AD
		I

Competency 16.12: Choose electronic tools to support collaboration
Key Indicators:
16.12.1 Determine the categorization of collaborative tools (e.g., synchronous or asynchronous)
16.12.2 Distinguish characteristics of collaborative tools
16.12.3 Identify various collaborative tools and effective uses
16.12.4 Determine number of options for collaborative tools

BIL: Recommended

EDU:	12	AD
		I

Competency 16.13: Manage content
Key Indicators:
16.13.1 Identify critical processes for managing content
16.13.2 Use taxonomy framework to manage content
16.13.3 Build customized taxonomy by analyzing internal work processes and information
16.13.4 Determine effectiveness and efficiency of portal in gathering information resources

Knowledge-Management and Culture

BIL: Recommended

EDU:	12	AD
		I

Competency 16.14: Analyze organizational culture and the role of knowledge-management

Key Indicators:

16.14.1 Determine how an organization acquires culture
16.14.2 Explain culture as tactic knowledge
16.14.3 Discuss importance of organization culture and its role in implementing knowledge-management
16.14.4 Examine barriers of assumption in implementing knowledge-management

BIL: Recommended

EDU:	12	AD
		I

Competency 16.15: Determine barriers that affect knowledge-management implementation

Key Indicators:

16.15.1 Identify cultural assumptions that derail knowledge-management approach
16.15.2 Identify conditions that create favorable acceptance to knowledge-management approach
16.15.3 Create new values (rewards/recognition) that support knowledge sharing
16.15.4 Use the skills of change agent in implementing knowledge-management
16.15.5 Recognize how trust impacts KM cultural transformation
16.15.6 Recognize trust-builders and trust-busters in organizations
16.15.7 Describe the keys to successful cultural transformation

BIL: Recommended

EDU:	12	AD
		I

Competency 16.16: Design knowledge-management communication plan
Key Indicators:
16.16.1 Develop message that portrays important components of knowledge-management (e.g., definition, strategies, need for action, what will be different)
16.16.2 Recognize framework levels for implementation (e.g., awareness, commitment, passion)
16.16.3 Use variety of media to communicate message
16.16.4 Design project plan for communicating knowledge-management within organization
16.16.5 Build in feedback loops

Knowledge-Management Measures

BIL: Recommended

EDU:	12	AD
		I

Competency 16.17: Design knowledge-management measurement system
Key Indicators:
16.17.1 Determine purposes for measuring knowledge-management
16.17.2 Identify measures that have leading and lagging indicators
16.17.3 Link to organization's measurement system
16.17.4 Combine facts with words, like anecdotes and sound bites
16.17.5 Communicate measures and results
16.17.6 Craft a communications strategy for measures

BIL: Recommended

EDU:	12	AD
		I

Competency 16.18: Evaluate various knowledge-management measurement approaches
Key Indicators:
16.18.1 Create balanced scorecard performance measurement system
16.18.2 Determine perspectives of balanced scorecard measurement system
16.18.3 Evaluate strengths and weaknesses of each perspective of balanced scorecard measurement system

16.18.4 Apply knowledge-management valuation approached for measuring returns on investments in knowledge assets
16.18.5 Develop a knowledge-management strategy using the valuation approach
16.18.6 Use knowledge-management maturity measurement model to measure progress and reach goals
16.18.7 Survey employee's opinions as a knowledge-management measure

BIL: Recommended

EDU:	12	AD
		I

Competency 16.19: Measure intellectual capital
Key Indicators:
16.19.1 Define intellectual capital
16.19.2 Analyze various approaches for measuring intellectual capital
16.19.3 Use the intangible assets monitor method for measuring intellectual assets (human competence, external structure, internal structure)

Knowledge-Management Implementation

BIL: Recommended

EDU:	12	AD
		I

Competency 16.20: Design knowledge-management implementation plan
Key Indicators:
16.20.1 Establish timeframe for implementing knowledge-management
16.20.2 Assess pilot project effectiveness
16.20.3 Map an expansion strategy
16.20.4 Embed knowledge-management into organization

BIL: Recommended

EDU:	12	AD

Competency 16.21: Practice ethical behavior for knowledge-management
Key Indicators:
16.21.1 Describe the ethics within an organization's knowledge-management system
16.21.2 Identify common business practices using ethical approaches

16.21.3 Identify key components of an organization's ethics program
16.21.4 Recognize the process of ethical decision-making
16.21.5 Identify the key components of the certified knowledge-management program
16.21.6 Distinguish types of intellectual assets
16.21.7 Identify the goals of intellectual property law
16.21.8 Identify key legal issues regarding intellectual property
16.21.9 Recognize the legal and practical challenges the Internet presents

BIL: Recommended

EDU:	12	AD
		I

Competency 16.22: Calculate Return on Investment (ROI) for Knowledge-Management programs/projects

Key Indicators:

16.22.1 Calculate return on investment, expected value of a probability distribution, variance of a probability distribution, and level of risk relative to the mean of the probability distribution
16.22.2 Interpret a decision under uncertainty
16.22.3 Identify subjective probabilities

BIL: Recommended

EDU:	12	AD
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Competency 16.23: Design physical space for effective knowledge-management

Key Indicators:

16.23.1 Analyze a physical environment to determine what affects the physical location
16.23.2 Identify the best design for fostering collaboration
16.23.3 Recognize how physical space can influence knowledge flow
16.23.4 Identify the key elements toward increasing productivity
16.23.5 Recognize experts' design methodologies
16.23.6 Recognize the new trends in physical space design
16.23.7 Interpret how modern demands on business have altered the work environment

BIL: Recommended

EDU:	12	AD
		I

Competency 16.24: Explain the relationship of social network engineering and knowledge-management

Key Indicators:

16.24.1 Recognize the role of social networks in capturing, organizing and sharing information
16.24.2 Map social networks utilizing the knowledge-management
16.24.3 Interpret and evaluate social and knowledge network maps
16.24.4 Identify opportunities for improvement from network maps
16.24.5 Identify means of altering social networks to improve knowledge flow

Appendix A

Review Panels

Ohio Business TCP Futuring Panel Participants

Nichole Nares, Human Resource Consultant, Nationwide Mutual Insurance Company, Columbus

Roger Campbell, Training Manager, Worthington Industries, Columbus

Jane Cape, Dean, Business Technologies, Clark State Community College, Springfield

Julie Danner, Manager, Training and Development, Ross Products Division, Columbus

Chris Hamm, Financial Consultant, First Merit Securities, Medina

Christina Hutchings, Manager, Financial Reporting, Lane Bryant, Reynoldsburg

Jeff Hutchins, Founder, VITAC (retired), Canonsburg, PA

John Martin, President, Optimum System Products, Inc., Columbus

James Nemcek, CEO, Alearna, Columbus

Karen Nemcek, E-Learning Consultant, Alearna, Columbus

Linda Shimp, Human Resources Manager, YSK Corporation, Chillicothe

Roy Smoot, President & CEO, Columbus Speech and Hearing, Columbus

Cheryl Sparks, Human Resources Director; Vorys, Sater, Seymour and Pease LLP; Columbus

Julie Talks, Accounting/Office Manager, Optimum Systems, Columbus

Robert Thomas, Case Manager, Supervisor, Franklin County Board of MR/DD—Case Management, Columbus

Judith Wright, Corporate Secretary, Karlsberger Companies, Columbus

Kym Yahn, Workforce Development Manager, Dayton Area Chamber of Commerce, Dayton

Joseph Zielinski, Certified Business Consultant, EISC, Inc., Toledo

Ohio Business Core TCP
Focus Panel Participants

Dotti Falkenstein, Coordinator, Cooperative Business Education, Centerville High School, Centerville

Dennis Folkerth, Business and Marketing Instructor, Upper Valley Joint Vocational School, Piqua

Virginia Groff, Business Information Technology Instructor, Mansfield Senior High School, Mansfield

Sue Lake, Business Instructor, Muskingum-Perry Career Center, Zanesville

Stephanie Mendelson, Business Administration and Management Instructor, Swiss Hills Career Center, Woodsfield

Sue Rossi, Dean; Business, Computer, & Office Information Technology; Jefferson Community College; Steubenville

Larry Zachrich, Dean of Business, Northwest State Community College, Archbold

Ohio Business Management TCP
Human Resources
Business and Industry Focus Panel Participants

Pam Comer, Division Director, OfficeTeam, Columbus

Craig Fusco, Division Director, OfficeTeam, Columbus

Robert Kinzig, Director, Human Resources, Limited Brands, Columbus

Nichole Nares, Human Resources Consultant, Nationwide Mutual Insurance Company, Columbus

Linda Shimp, Human Resources Manager, YSK Corp., Chillicothe

Bethany Vanderson, Director, Training & Development, Nationwide Mutual Insurance Company, Columbus

Lisa Wetherell, Assistant Director of Human Resources, CIGNA Health Care, Columbus

Ohio Business Management TCP
Business and Professional Panel Participants

Business Management Panel

Norman Blanchard, Economic Development Director, Cambridge Guernsey County Community Improvement Corporation, Cambridge

Stuart A. Bishop, President, Pharmacy Systems, Inc., Dublin

Dave Edwards, Jr., President/Owner, Edwards Steel, Columbus

David Eyestone, Vice President, Columbus Collections, The Huntington National Bank, Columbus

Jeff Herendeen, Sourcing Manager, Ferguson-Integrated Systems Division, Cincinnati

Kathy S. Loken, Section Manager 3/Officer Title/Vice President, The Huntington National Bank, Columbus

William B. Reiber, President, Columbus Paperbox, Columbus

David Rumpke, Consulting IT Architect, Nationwide Mutual Insurance Company, Columbus

Robert Vajda; Chairman/CEO; Varo Engineers, Limited; Columbus

Human Resources Panel

Mark Bobes, Director, HRD & Learning, The Goodyear Tire & Rubber Company, Akron

Patricia Fann, Human Resources Representative, Babcock & Wilcox, Barberton

Diana Fidler, Assistant Vice President, Human Resources Senior Generalist, The Huntington National Bank, Columbus

Theresa Ginter, Human Resource Manager, Carson Industries LLC, Napoleon

David Hamann, PHR, Human Resources Coordinator, School of PAES / The Ohio State University, Columbus

Betsy Marozzi, PHR, HR Generalist, Unizan Bank, Columbus

Esther Schwabauer; PHR; Manager of Human Resources; Vorys, Sater, Seymour and Pease LLP; Columbus

Cheryl Sparks; Director of Human Resources; Vorys, Sater, Seymour and Pease LLP; Columbus

Stacy Stewart, Human Resources Supervisor, Ormet Corporation, Hannibal

Ohio Business Management TCP Educators Panel Participants

Business Management Panel

Sheila Bellew, Coordinator, Cooperative Business Education, Mansfield Senior High School, Mansfield

Lori Brinker, Assistant Professor, The University of Akron - Wayne College, Orrville

Meg Clark, Cincinnati State Technical & Community College, Cincinnati

Norvel Crandall, Instructor, Morgan High School, McConnelsville

Jacqueline Gebhart, Instructor, Guernsey-Noble Career Center, Senecaville

Christie Leis, Business Instructor, Warren County Career Center, Lebanon

Angela Ortiz, Coordinator of Technical Programs, Columbus Public Schools, Adult & Community Education, Columbus

Susan Pope, Associate Professor, Business Technology, University of Akron, Akron

Carolyn Waits, Program Chair/Instructor, Cincinnati State Technical & Community College, Cincinnati

Debra Werner, Instructor, Licking County Joint Vocational School, Newark

Debra Wortman, Business Department Chair, W. E. Stebbins High School, Riverside

John Yeamans, Department Chair, Business, Sinclair Community College, Dayton

Human Resources Panel

Dave Cater, Tech Prep Instructor, Watkins Memorial High School, Pataskala

Tina Chapman, Business Instructor, Norton High School, Norton

Teresa Gordon, Business Technologies Instructor, Watkins Memorial High School, Pataskala

George Hicks, Associate Professor, Muskingum Area Technical College, Zanesville

Candace Holland, Business Instructor, Norton High School, Norton

Mike Laird, Instructor, Tri-Rivers Career Center, Marion

Patsy Malavite, Associate Professor/Coordinator of Computer Applications, University of Akron – Wayne College, Orrville

Stephanie Mendelson, Business, Administration, & Management Instructor, Swiss Hills Career Center, Woodsfield

Donna Neman, Instructor, Barberton Schools, Barberton

Ohio Business Management TCP Stakeholders Panel Participants

Business Management Panel

Norm Blanchard, Economic Development Director, Cambridge-Guernsey County Community Improvement Corporation, Cambridge

Meg Clark, Cincinnati State Technical and Community College, Cincinnati

Angela Ortiz, Coordinator of Technical Programs, Columbus Public Schools/Adult and Community Education, Columbus

Robert Vajda, Chairman/CEO; Varo Engineers, Limited; Columbus

Debra Wortman, Business Department Chair, Stebbins High School, Riverside

Human Resources Panel

Theresa Ginter, Human Resource Manager, Carson Industries LLC, Napolean

Mike Laird, Instructor, Tri-River Career Center, Marion

Bill Waxman, Instructor, Edison Community College, Piqua

Appendix B

College Tech Prep Pathway Template

____
(High School)

____
(Career Center)

____
(Community College)

College Tech Prep Program

____
(School Year)

9th GRADE	CREDIT	10th GRADE	CREDIT	11th GRADE	CREDIT	12th GRADE	CREDIT

Recommended Prerequisites for Grade 11 of Tech Prep	Recommended for College Portion of Tech Prep

Junior Year Tech Center/College Technical Courses	
*Technical Subjects	On-transcript ________ College Credits
Articulated Credits: -__________________________ Community College	

Senior Year Tech Center/College Technical Courses	
*Technical Subjects	________ College Credits

This template is used to facilitate Ohio College Tech Prep Pathways and is submitted by the Ohio College Tech Prep Consortium with the application.
Revised 6/20/03

DEGR ASSOCIATE OF ____________________

____________________ **- College Tech Prep** ____________________
(Career Center) (Name of College Tech Prep Program)

Term Taken	**First Term**	**Pre-requisite**	**Co-requisite**	**Quarter Credit Hours**	**University Pathway Equivalent**	**Completed as Tech Prep Component**
Term Taken	**Second Term**	**Pre-requisite**	**Co-requisite**			
Term Taken	**Third Term**	**Pre-requisite**	**Co-requisite**			

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DEGRE ASSOCIATE OF ______________________________

______________________ **- College Tech Prep** ______________________________
(Career Center) (Name of College Tech Prep Program)

Term Taken	Fourth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

Term Taken	Fifth Term	Pre-requisite	Co-requisite			

Term Taken	Sixth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

______ **Total Quarter Credit Hours**

Revised 6/20/03

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Appendix C

Professional Associations and Certifications

Business Management

Professional Associations and Certifications

Associations

- American Management Association
- American National Standard Institute (ANSI)
- American Production Inventory Control Society (APICS)
- American Society for Quality (ASQ)
- Association for Quality and Participation (AQP)
- Institute for Supply and Management (ISM)
- International Standards Organization (ISO)
- National Association of Purchasing Managers
- National Management Association
- Software Engineering Institute's Capability Maturity Model (SEI)
- Human Resource Certification Institute (HRCI)
- International Association for Human resource Information Management (IHRIM)
- Society of Human Resource Management (SHRM)

Certifications

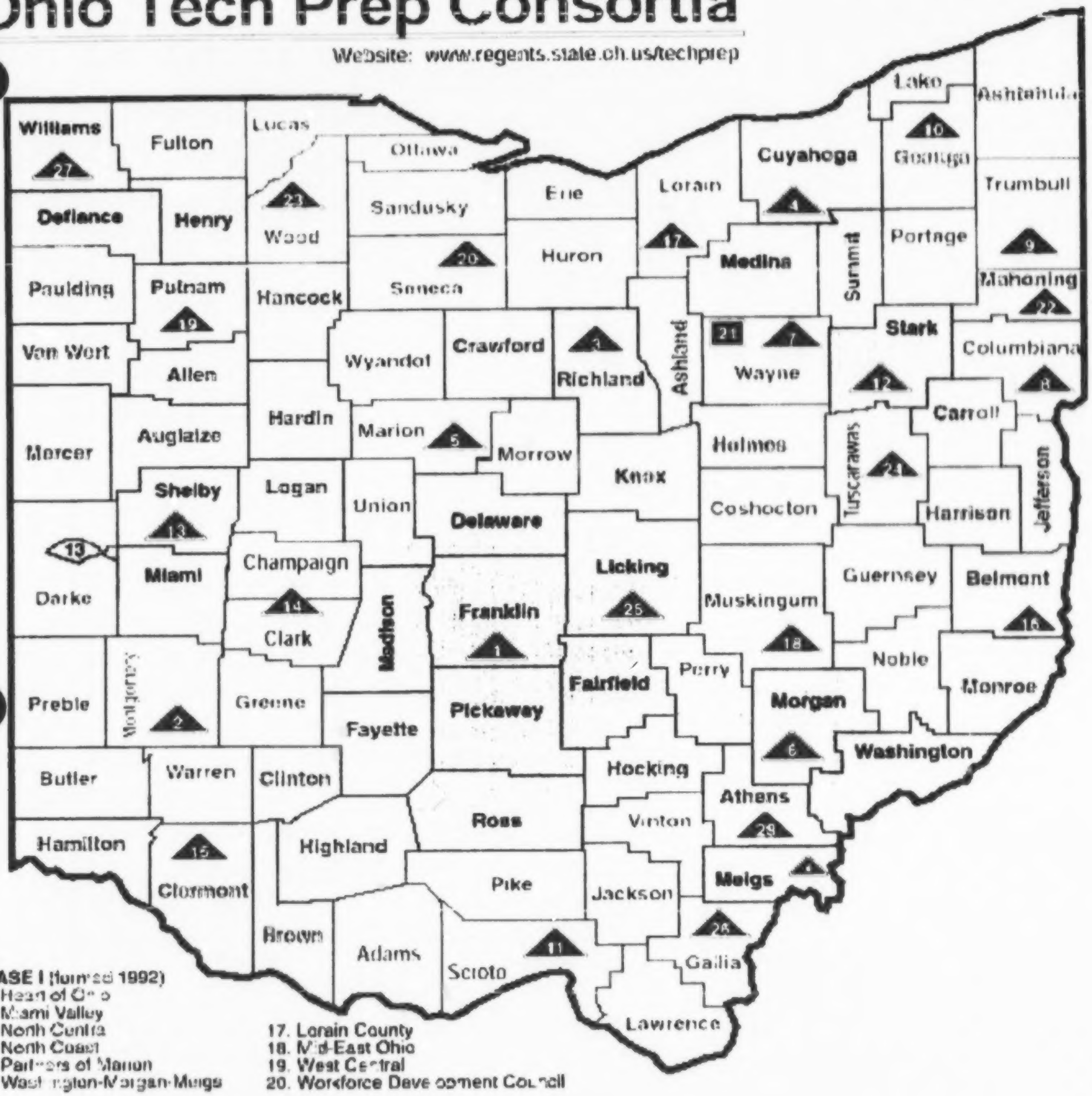
- AMA Self-Study Certificate Program
- Certified Purchasing Managers (ISM) (CPM)
- Certified Quality Manager (ASQ)
- International Project Management Association
- Knowledge-Management (KM) Certification
- Project Management Certification
- Project Management Institute (PMI) – Certification
- Certified Compensation Professional (CBP) via World at Work Association
- Certified Employee Benefits Specialist (CEBS) via International Foundation of Employee Benefits Plan
- Human Resource Certification Institute (HRCI) the HR Certification Institute that is affiliate of Society for Human Resource Management and offer the Senior Professional in Human Resource (PHR) 18 Duke Street, Alexandria, VA 703-548-3440
- Professional Human Resource Certification (PHR)

Appendix D

Ohio Tech Prep Consortia

Ohio Tech Prep Consortia

Website: www.regents.state.oh.us/techprep


Williams
27
Fulton
Lucas
Ottawa
Defiance
Henry
23
Wood
Sandusky
Erie
Lorain
17
Cuyahoga
4
Lake
10
Geauga
Ashtabula
Trumbull
9
Pauling
Putnam
19
Hancock
20
Seneca
Huron
Medina
Summit
Portage
Mahoning
22
Van Wert
Allen
Wyandot
Crawford
3
Richland
Ashland
21
7
Wayne
Stark
12
Columbiana
8
Mercer
Auglaize
Hardin
Marion
5
Morrow
Knox
Holmes
Tuscarawas
24
Carroll
Harrison
Jefferson
Shelby
13
Logan
Union
Delaware
Coshocton
13
Darke
Miami
Champaign
14
Clark
Madison
Franklin
1
Licking
25
Muskingum
18
Guernsey
Belmont
16
Noble
Monroe
Preble
Montgomery
2
Greene
Fayette
Pickaway
Fairfield
Perry
Morgan
6
Washington
Butler
Warren
Clinton
Hocking
Athens
29
Ross
Vinton
Hamilton
15
Clermont
Highland
Pike
Jackson
Meigs
4
28
Brown
Adams
Scioto
11
Gallia
Lawrence

PHASE I (formed 1992)
1. Heart of Ohio
2. Miami Valley
3. North Central
4. North Coast
5. Partners of Marion
6. Washington-Morgan-Meigs

PHASE II (formed 1993)
7. Akron Area
8. Columbiana County
9. Kent
10. Lakeland
11. Ohio South
12. Stark County
13. Upper Miami Valley

PHASE III (formed 1994)
14. Clark State
15. Greater Cincinnati
Eastern Ohio Valley

17. Lorain County
18. Mid-East Ohio
19. West Central
20. Workforce Development Council

PHASE IV (formed 1995)
21 Ohio State - Agricultural Technical Institute (with programs at locations throughout Ohio)
22. Mahoning Area
23. Northwest Ohio
24. Tuscarawas Valley

PHASE V (formed 1996)
25. East Central Ohio
26. Ohio Valley
27. Maumee Valley
28. Southeast

Note: Consortia 8, 9 and 24 merged with headquarters at #9

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EFF-089 (1/2003)